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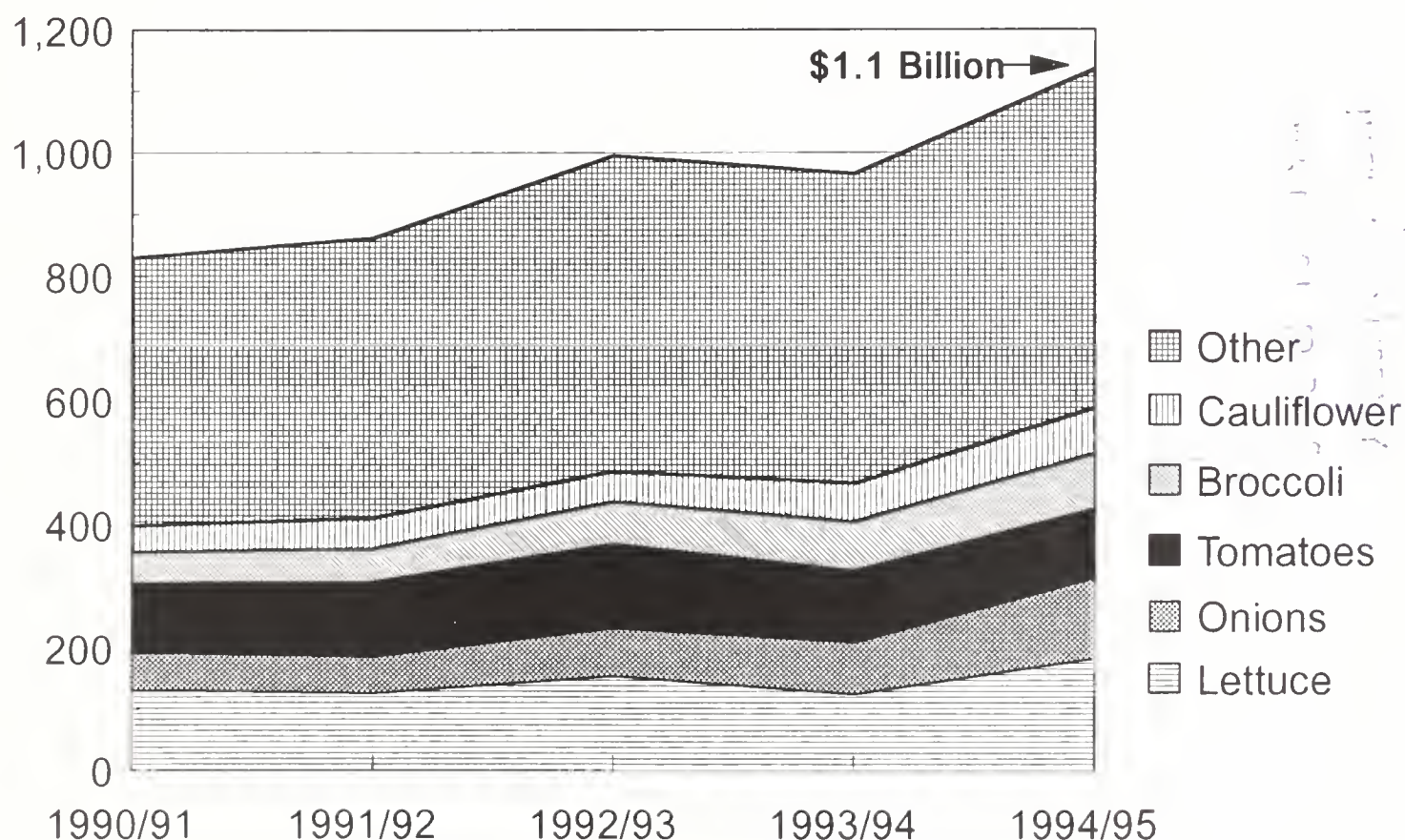
Foreign
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Circular Series
FHORT 1-96
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World Horticultural Trade & U.S. Export Opportunities

VALUE OF U.S. FRESH VEGETABLE EXPORTS REACHED RECORD LEVEL IN FY 1995

(\$1,000)



Source: U.S. Department of Commerce, Bureau of the Census.

U.S. fresh vegetable exports (including potatoes) reached a record \$1.1 billion in fiscal year (FY) 1995, 17 percent above the previous year's value and 37 percent above FY 1991. Topping the list for fresh vegetable exports were lettuce, onions, tomatoes, broccoli, and cauliflower, followed by asparagus, peppers, and celery. Carrots and cucumbers, with values of \$41 million and \$17 million, respectively, also registered significant gains above last year. Canada was by far the leading U.S. customer for vegetables, accounting for nearly 70 percent of the total FY 1995 export value. Other major destinations included Japan, Mexico, the European Union (EU), and other Asian countries. [For further details on U.S. vegetable exports in FY 1995, see article on page 9.]

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Export Summary

See Notice on page 4.

All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds,
1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon,
1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

NOTICE:

Due to the partial U.S. Government furlough situation, U.S. export and import statistics of selected horticultural commodities, normally obtained from the U.S. Department of Commerce, Bureau of the Census, will not be available for this month's circular publication.

EXPORT NEWS AND OPPORTUNITIES

Guatemala opens small window for imported apples, U.S. likely to be primary beneficiary

Through the end of 1995, the Government of Guatemala agreed to issue apple import licenses for 900 metric tons and maintain a 20 percent import tariff, virtually assuring the United States, which has traditionally been the country's primary supplier, access for total sales of about \$1 million this season, according to the Agricultural Attache in Guatemala City. These actions should have provided sufficient import volume needed to meet consumer demand for apples during the critical holiday period. U.S. apple exports to Guatemala have been rising sharply in recent years, totaling \$1.2 million in 1994/95, up from only \$73,000 in 1990/91. While the issuance of the apple import permits reduces the immediate concern over access for the holiday season, Guatemala still has not met its WTO commitment to eliminate import licensing.

GSM-102 credit guarantee program increases allocation to Russia by \$20 million to total \$50 million

Table 1 (page 8) lists registrations in FY 1996 through December 1 for various horticultural commodities and products. Under the GSM-102 credit guarantee program, repayment terms are usually three years. For example, through this program, the U.S. exporter can be paid by the U.S. bank immediately upon export if an irrevocable letter of credit is opened by the importer's bank and financed by the U.S. bank. The importer's bank then has up to three years to repay the U.S. bank. The following table presents FY 1996 allocations by country by commodity and product. A distinctive feature of the FY 1996 GSM-102 is the move toward more "commodity basket" programs, i.e., one country allocation under which are listed several commodities and products that may be registered

on a first-come, first-served basis. This structure provides more flexibility to exporters in registering different sizes of shipments under the program. Repayment terms vary under the program, from the standard 3-year to 90-day terms. For details on terms and authorizations see the footnotes to the Table. Note: applications to include other horticultural commodities and products in GSM-102 programs will be considered by FAS. (*For further information on the GSM-102 program for horticultural commodities, contact Robert Knapp, 202-720-6877*)

WORLD TRADE SITUATION AND POLICY UPDATES

Export prices of Turkish hazelnuts have dropped; the Government of Turkey will lend growers \$50 million

Export prices for Turkish hazelnuts have declined significantly since the beginning of the 1995/96 marketing year in September 1995. Trade sources report that the price for hazelnuts hovered around US\$310 per 100 kilograms (FOB, inshell basis, depending on quality) in late November, compared with US\$370 in early September. Larger early season grower sales, weaker export demand, and uncertainty about financing for the government's support price are contributing to the present weakness in prices.

Unlike last year when farmers withheld hazelnuts from the market in expectation of higher prices, growers this year appear to be selling much earlier. Although export registrations through October 27 lagged behind last year's pace (55,000 metric tons versus 64,000 tons), sources believe the trade is long and estimate that 40 percent or more of the crop has been sold. Meanwhile, importers may have taken advantage of lower prices at the end of the 1994/95 marketing year to build stocks and are not anxious to buy more hazelnuts. Given larger early season supplies and weaker early season demand, prices have decreased steadily.

In addition, uncertainty about financing the government's announced support price has contributed to price weakness. Although the Government of Turkey technically only supports the prices of grains, sugar beets, and tobacco, the government announces its expected price for hazelnuts. This price then becomes the price the quasi-governmental cooperative, FISKOBIRLIK, pays its members.

In August 1995, the government announced a support price of US\$1.70 per kilogram (inshell basis), indexed to the U.S. dollar. Accordingly, FISKOBIRLIK posted a price of 80,000 Turkish Lira per kilogram (inshell basis), based on the prevailing exchange rate. Symptomatic of its financial difficulties, FISKOBIRLIK did not adjust its lira buying price as the dollar appreciated against the lira (US \$1.00 = TL 51,000 as of November 6, 1995). So far, FISKOBIRLIK has purchased only about 11,000 tons of hazelnuts, and prices to growers have fallen as low as TL 70,000 per kilogram.

To remedy this situation, the government indicated that the state Agricultural Bank would lend FISKOBIRLIK TL 2.5 trillion (about US\$50 million) at 50 percent interest, half the going commercial rate, to buy hazelnuts. The Bank and FISKOBIRLIK have yet to agree to the terms of the loan. The impasse centers on collateral. FISKOBIRLIK offers the hazelnuts as collateral, while the Bank would prefer other assets.

Market observers believe that FISKOBIRLIK and the Bank will eventually come to terms. With an agreement, they expect FISKOBIRLIK to index its price to changes in the dollar and purchase up to 25,000 tons of hazelnuts from December 1995 to February 1996. Market analysts anticipate the re-entry of FISKOBIRLIK into the market will strengthen prices but remain skeptical that prices will recover to early season levels. Most observers continue to estimate the Turkish hazelnut crop at between 400,000 and 450,000 tons. USDA estimates the 1995/96 Turkish hazelnut crop at 450,000 tons.

India provides preferential duties on pistachios from Pakistan

India, a member of the South Asian Association for Regional Cooperation (SAARC), has begun applying preferential SAARC duties on pistachios imported from Pakistan as of December 7. The SAARC agreement does not extend tariff preferences to almonds. USDA earlier submitted a request that neither almonds nor pistachios should be included under SAARC preferential duties, on the assumption that commodities of Afghani and Iranian origin would likely be transshipped through Pakistan and mislabeled as of Pakistani origin to obtain the lower customs duty.

The new customs duty will carry a rate of 10 percent lower for pistachios of Pakistani origin. Thus, the duty on Pakistani pistachios will be 45 percent ad valorem, compared to a duty rate of 50 percent for pistachios from other origins.

Ecuador releases Washington State fruit; problems remain for California produce in Ecuador, Argentina, and Colombia

The recent detections of oriental fruit fly (OFF) in California are continuing to generate problems for California-produced fruit in a number of South American countries.

Ecuador, following intensive efforts by the Agricultural Attache in Quito, USDA's Animal and Plant Health Inspection Service (APHIS), and FAS, agreed on December 1 to release the Washington State product and permit trade to resume. Ecuador had implemented a total ban on imports of fruit from the United States on November 15 in response to the OFF detections. This action resulted in the detention of upwards of 40 containers of U.S. fruit, most of which had originated from Washington State (apples and pears). Fruit from California, however, can enter only if fumigated. As of December 5, the Government of Ecuador (GOE) was insisting that five containers of California fruit grapes and kiwifruit being held in port be fumigated before release, an action that would be extremely detrimental to the quality of the fruit. Efforts by the Agricultural Attache and local APHIS

representative to convince the Ecuadorian officials that fumigation is unwarranted have been unsuccessful. A visit to California by two quarantine officials from Ecuador in early January may help to clarify how future shipments of produce from that state are to be handled.

Argentina's plant quarantine agency suspended imports of fruit originating from California on October 27. Despite the subsequent explanation of the OFF situation provided by APHIS to its Argentine counterpart, the ban remains in place. Colombia's situation is unclear; discussions on the OFF situation are continuing. According to a recent report by the Agricultural Attache in Bogota, Colombia is considering imposing a ban on imports of produce from California, but has delayed a final decision pending the outcome of a review of APHIS-supplied information on the OFF situation. There have been reports from the trade that this situation has prompted the cancellation of orders by Colombian importers.

U.S. imports of Turkish dried apricots rise in 1994/95

U.S. imports of Turkish dried apricots increased to a record 14,525 tons in marketing year 1994/95 (August-July), and were valued at nearly \$24 million. This represents an increase of 70 percent above the previous year. Turkish production of dried apricots, which occurs primarily in the Malatya Province in Eastern Anatolia, has been growing rapidly in recent years. Due to weather changes, Turkish production can vary greatly (1993/94 -30,000 tons, 1994/95-100,000 tons). Production in 1995/96 is estimated at 60,000 tons. Domestic consumption is only 5 percent of production. The industry continues to grow because of strong export demand and good prices.

Most apricot processors are small and export oriented. Some exporters are establishing joint ventures with foreign importers to process dried apricots. Currently, most of the exports are shipped bulk in 12.5 kilogram boxes. However, processors have improved quality and are increasing shipments of consumer ready (100 to 200 gram) packages. The European Union and the United States are Turkey's largest markets.

India introduces freight subsidy scheme for horticultural products exports

In an attempt to popularize India's tropical fruits, vegetables and floriculture products abroad, the Indian government recently announced a freight subsidy scheme to cover a range of Indian fruits and vegetables, according to the Agricultural Counselor in New Delhi. This program will be for exports taking place during September 1, 1995, to March 31, 1996.

Under this scheme exporters will be entitled to a subsidy of \$170 per metric ton on exports of fresh fruits and vegetables to West Asia, South East Asia and CIS countries, or 25 percent of the air freight rate, whichever is less. The subsidy for exports to Europe (other than CIS), North America and Far East will be \$285 per metric ton, or 25 percent of the air freight rate. Fresh fruits and vegetables covered under this scheme include mangoes (other than Alphonso variety), grapes, bananas, pomegranates, lychees, strawberries, chickoo, custard apples and berries, asparagus, broccoli, capsicum, and mushroom. Floriculture products include cut flowers, live plants, cuttings and foliage, bulbs and tubers, and tissue culture products. Total funding for this freight subsidy program is estimated to be \$5.5 million.

Reportedly, this export scheme strategy was designed to penetrate and introduce Indian fruits and vegetables into global market places. This subsidy will be withdrawn when export volume increases, but it remains unclear whether the subsidy scheme will continue beyond March 31, 1996.

U.S. imports of horticultural products from India from January to September 1995 were valued at \$118 million, down 23 percent from the same period a year earlier. Edible tree nuts, primarily cashews, accounted for approximately 76 percent of the total import value.

FY 1996 GSM-102 Credit Guarantee Coverage 1/

Country/Commodity	Announced Allocations FY 1996 (\$1,000)	Exporter Applications Approved FY 1996 (\$1,000)	Balance (\$1,000)
China	100,000	0	100,000
Potatoes 2/	0	0	0
Hops and Products	0	0	0
India	15,000	0	15,000
Treenuts 3/	0	0	0
Indonesia	160,000	0	160,000
Potatoes 2/	0	0	0
Tree nuts 4/	0	0	0
Fresh fruit 19/	0	0	0
Raisins and dates	0	0	0
Papua New Guinea 5/	1,000	0	1,000
Canned Vegetables	0	0	0
Czech Republic	10,000	0	10,000
Potatoes 6/	0	0	0
Poland 5/	25,000	0	25,000
Potatoes 2/	0	0	0
Russia 5/	50,000	20,000	30,000
Canned or Frozen Vegetables 7/	0	0	0
Fresh Fruits 8/	0	0	0
Frozen Concentrated Orange Juice	0	0	0
Almonds	0	0	0
Potato Flakes	0	0	0
Egypt 9/	100,000	0	100,000
Potatoes 6/	0	0	0
Tunisia	75,000	0	75,000
Almonds/Walnuts	0	0	0
Raisins	0	0	0
South Africa Region 10/	50,000	0	50,000
Tree nuts 4/	0	0	0
Potatoes 2/	0	0	0
East Caribbean Region 11/	50,000	0	50,000
Fresh fruit 12/	0	0	0
Mexico 13/	700,000	0	700,000
Almonds	0	0	0
Fresh Fruits 14/	0	0	0
Hops and Products	0	0	0
Potatoes 6/	0	0	0
Andean Region 15/	200,000	0	200,000
Tree Nuts and	0	0	0
Fresh Fruits 16/	0	0	0
Central America Region 17/	40,000	0	40,000
Potatoes 6/	0	0	0
Brazil	150,000	0	150,000
Fresh Fruit 18/	0	0	0
Potatoes 6/	0	0	0

1/ Coverage announced for FY 1996 as of December 1, 1995 as detailed in FAS Program Announcements (tel: 202-690-1621 for information); unless otherwise noted, terms are FOB, 90-days to 3 years. 2/ Cut and frozen for french fries, and potato flakes. 3/ Walnuts, pistachios, almonds. 4/ Almonds, walnuts. 5/ Terms are 90 days to one year; for 1-yr terms for Russia, principal repayments plus accrued interest are due at 6-month intervals; C&F coverage also available to point of first ocean discharge for non-Russian flag carriers (see Program Announcement for details). 6/ Cut and frozen for french fries. 7/ Canned or frozen (corn, peas, mixed vegetables, tomatoes, green beans, and spinach). 8/ Apples, oranges, tangerines, lemons, and pears. 9/ Egypt program (90-day to one year terms) authorized at \$160-million level for FY96, details for remaining \$60 million will be issued later. 10/ Angola, Botswana, Burundi, Kenya, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Rwanda, Seychelles, South Africa, Swaziland, Tanzania, Uganda, Zaire, Zambia, Zimbabwe. 11/ Barbados, Grenada, Guyana, St. Lucia, St. Vincent and the Grenadines, Suriname, and Trinidad and Tobago; \$70 million authorized for FY96, details of remaining \$20 million will be issued later. 12/ Apples, grapes, pears, plums, and peaches. 13/ Mexico's terms are 90 days to 2 years; \$1.25 billion authorized for FY96, details for remaining \$550 million will be issued later. 14/ Apples, pears, plums, peaches, nectarines, kiwifruit, and strawberries. 15/ Includes Bolivia, Colombia, Ecuador, Chile, Peru, and Venezuela; \$350 million authorized for FY96, details for remaining \$150 million will be issued later. 16/ Almonds, walnuts, pistachios, pecans, and hazelnuts; apples, pears, plums, peaches, nectarines, and strawberries. 17/ Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and Panama; \$60 million authorized for FY96, details for remaining \$20 million will be issued later. 18/ Apples; Brazil coverage is for one-year terms; the FY96 authorization is for \$255 million, details of the remaining \$105 million will be issued later. 19/ Fresh fruit including apples, grapes, oranges, pears, plums, prunes, cherries, and lemons.

U.S. FRESH VEGETABLE EXPORTS HIT A RECORD IN FY 1995

U.S. fresh vegetable exports (including potatoes) reached a record \$1.1 billion in fiscal year (FY) 1995, 17 percent above the previous year's value and 37 percent above FY 1991. Canada was once again the top market for U.S. vegetable exports, followed by Japan, Mexico, EU-15 and other Asian countries. Leading the way for fresh vegetable exports were lettuce and onions, followed by tomatoes, broccoli, asparagus, cauliflower, peppers, and celery. Carrots and cucumbers, with values of \$41 million and \$17 million, respectively, registered significant gains above the previous year. As consumer incomes rise and modern supermarkets appear in emerging markets, particularly in Asia, opportunities for pre-cut vegetable sales will likely appear. Demand for organically produced vegetables is also on the rise, especially in Japan.

Summary

U.S. exports of fresh vegetables, including potatoes, to overseas markets continue to grow. In FY 1995, exports totaled 1.8 million metric tons valued at \$1.1 billion. Canada was by far the leading U.S. market for vegetables exports, accounting for nearly 70 percent of the total 1995 export value. Japan was the second largest market and the fastest growing. Of the top 8 vegetables exported in FY 1995, Canada was the number one market for lettuce, tomatoes, broccoli, bell peppers, and celery, with Japan claiming the number one ranking for onions, asparagus, and cauliflower.

Among the brightest prospects are export opportunities to Asia

U.S. fresh vegetable exports to Japan climbed from \$57 million in FY 1991 to a whopping \$207 million in FY 1995. This surge in U.S. fresh vegetable exports to Japan was triggered by rising consumer demand for year-round vegetables, declining Japanese vegetable production, frequent poor Japanese harvests caused by unfavorable weather, growing

consumer health consciousness, and a favorable dollar/yen exchange rate.

U.S. fresh vegetable exporters will have the opportunity to display their produce at a special "Fresh From the West" vegetable display at FOODEX Japan 1996 near Tokyo, scheduled for March 12-15, 1996. The display is organized cooperatively by the Western Growers Association and the States of California and Arizona, with expanded focus on U.S. pre-cut vegetables.

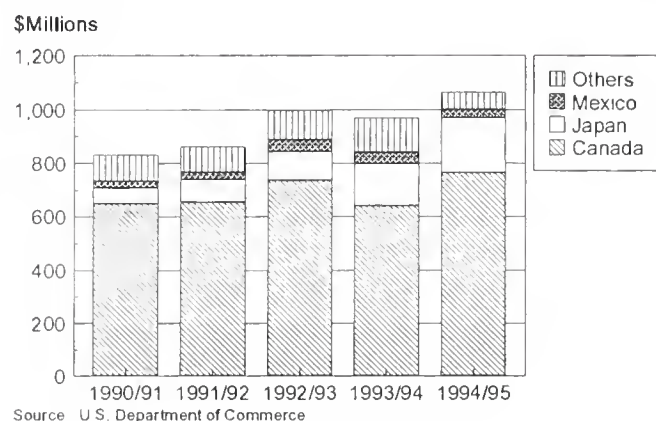
In Taiwan and Hong Kong, the top four U.S. vegetables exported were lettuce, onions, celery and broccoli. These four vegetable exports to Taiwan have doubled from \$15 million in FY 1991 to almost \$30 million in FY 1995. Other important Asian markets for fresh U.S. vegetables were Korea and Singapore.

U.S. exports to South America and Middle East small but growing

U.S. fresh vegetable sales to South America, a growing market valued at \$6 million, also registered significant gains in FY 1995. These

gains were triggered primarily by increases in vegetable exports to Venezuela, Brazil, Argentina, and Guyana. Exports to Venezuela alone accounted for 59 percent of the total U.S. export value. Significant sales gains were also made in Brazil and Argentina. Exports to the Middle East valued at \$4 million, about the same as in FY 1994, went primarily to United Arab Emirates, Kuwait, and Saudi Arabia. New export markets in FY 1995 for U.S. fresh vegetables included Vietnam, Cambodia, Brunei, Hungary, Cote d'Ivoire, Iran, Jordan, Oman and Bolivia.

U.S. Vegetable Exports Set Record in 1994/95; Exports to Canada and Japan up Significantly



Exports to the European Union decline

U.S. vegetable exports to the European Union were valued at \$26.3 million in FY 1995, 7 percent below the previous fiscal year and 24 percent below the FY 1991 value. Most U.S. fresh vegetable exports to the European Union (EU) face strong competition from European and Mediterranean countries, such as Spain, Morocco, Belgium, the Netherlands, Turkey and Israel. The bulk of U.S. vegetable exports to the EU occurs during October through February.

Lettuce is the top U.S. vegetable export

In FY 1995, U.S. exports of lettuce valued at \$184 million, up 46 percent from the previous year, continued to lead U.S. vegetable sales to

overseas markets. Canada remained the U.S. number one market for lettuce sales, accounting for a whopping 85 percent of the total value. Exports to Hong Kong, valued at \$9 million, ranked second, but were down 19 percent from FY 1994. Exports to Mexico during the same period declined 51 percent mainly as a result of the increased value of the U.S. dollar relative to the devalued Mexican peso; while exports to Japan dropped 32 percent, primarily due to an up and down trade pattern. Exports to Singapore and Taiwan have registered significant increases from FY 1992 to present.

Onions register sharpest increase in 1995

In FY 1995, U.S. onion exports were valued at a \$132 million, up 54 percent from a year earlier. During the same period, Japan replaced Canada as the number one market for onions.

U.S. exports to Japan were valued at \$52 million, up 205 percent from FY 1994. This dramatic increase was attributed largely to short domestic supplies caused by unfavorable weather in Hokkaido, Japan's major growing region, in 1994. The key factor for estimating Japanese imports each season is the expected level of domestic production of storage-type onions, which is centered in Hokkaido.

The 1995 Hokkaido onion crop is forecast at about 629,000 tons, up 18 percent from 1994. However, it is expected that this year's storage-type onions produced in Japan may have a relatively short storage life due to heavy rains in August. Hokkaido onions are normally brought to market in the early part of the season (September and October).

The larger crop triggered a downward trend in domestic prices. Reportedly, unable to bear the costs of storage (for imported onions) and unsure as to where the market would be going in the short term, importers decided to sell off onions at rock bottom prices: a 50 pound bag of U.S. onions reportedly was going for as little as 950 yen, well below cost.

Japanese onion prices are expected to range

between 1,000 to 1,200 yen per 20 kilogram bag this season. This means that U.S. imports will have to stay close to 900 yen in order to compete with domestically produced onions.

Most sources do not expect onion imports to be up until late in the season when Hokkaido's storage levels become low.

Broccoli, cauliflower, and peppers show strength in 1995

In FY 1995, U.S. **broccoli** exports valued at \$91 million were up 14 percent from the previous year. Exports to Canada, the leading market, accounted for about 55 percent of the total value. U.S. broccoli sales to Japan declined slightly in FY 1995, after surging in recent years.

U.S. exports of **cauliflower** in FY 1995 were valued at \$74 million, up 19 percent from a year earlier. This increase marks an incredible seventh consecutive year of growth, with Japan topping Canada over the past two years. Prior to FY 1994, Canada was the United States' primary export market for fresh cauliflower. These two markets accounted for 96 percent of the total U.S. export value in FY 1995.

U.S. exports of fresh **peppers** in FY 1995 were valued at \$49 million, up 8 percent from the previous year. Canada accounted for approximately 97 percent of the total value. U.S. exports of **celery** during the same period were valued at \$57 million, up significantly by 50 percent from the year earlier. Exports to Canada accounted for the lion's share with 78 percent of the total value. Other important markets included Hong Kong, Taiwan, and Singapore.

Asparagus and tomato exports slow

U.S. exports of fresh **asparagus**, mostly green, were valued at \$67 million in FY 1995, down 7 percent from the previous year. U.S. exports of asparagus to Asia, though, continued to gain ground in FY 1995 by registering sales at nearly \$45 million, up 10 percent from FY 1994. Japan, the United States' leading market, accounted for 99 percent of the total export

value to Asia and 66 percent of the total U.S. export value. U.S. asparagus exports to Hong Kong dropped dramatically in FY 1995 to \$164,000. Exports to Canada accounted for 21 percent of the total value, followed by Switzerland, the United Kingdom and Germany combining for about 10 percent of the remaining value. Colombia and Brazil emerged as new markets in FY 1995 with sales valued at \$13,000 and \$16,000, respectively.

U.S. exports of fresh **tomatoes** in FY 1995, valued at \$110 million, down 3 percent from the previous year, continued a downward slide for the second consecutive year. This decline was due mostly to reduced export volumes to Canada and Mexico. U.S. exports to Mexico, reflecting the impact of the weak peso, declined 21 percent from the level registered a year earlier. New export markets for U.S. fresh tomatoes included Lebanon, Chile, and Colombia, with total sales of \$23,000, \$16,000 and \$7,000, respectively. Exports to the former Soviet Union during the same period were valued at \$291,000, up dramatically from \$15,000 in FY 1994, as the result of GSM-102 sales.

Access for U.S. fresh tomatoes to Japanese market a priority issue

U.S. fresh tomato exports to Japan are currently banned, due to concerns over the possible transmission of tobacco blue mold (TBM).

USDA and industry officials have been working for several years with the Japanese government to resolve the market access issue. The U.S. industry has become frustrated by the lack of progress on the TBM issue and has suggested trade remedy action if market-opening efforts continue to stall in the future.

Japan's tomato production, consisting primarily of hothouse tomatoes that are more expensive to produce than those produced in the United States, is not considered to be competitive.

For further information call Emanuel McNeil at (202) 720-2083

Top Markets For U.S. Fresh Vegetables Exports, FY1990/91-FY1994/95
(\$1,000)

Country	1990/91	1991/92	1992/93	1993/94	1994/95
Canada	649,333	653,337	735,458	639,642	762,354
Japan	56,906	85,678	106,180	158,267	207,160
Mexico	28,059	28,400	46,742	40,817	31,429
EU-15 1/	34,714	31,263	27,942	28,233	26,340
Hong Kong	14,154	15,578	20,072	25,662	25,987
Korea, Rep.	1,629	243	248	9,171	12,922
Taiwan	5,086	4,967	6,487	9,125	10,929
Singapore	2,909	2,523	2,490	3,387	6,840
Switzerland	6,754	7,579	6,503	8,997	6,139
Former Soviet Union	0	29	687	5,493	3,508
Others	31,724	33,594	44,496	39,871	42,956
Total	831,268	863,191	997,305	968,665	1,136,564

Source: U.S. Department of Commerce.

1/ Comprising 12 EU member states from 1990/91 to 1993/94.

United States: Top Fresh Vegetable Exports, Fiscal Years 1990/91-94/95
(Value in \$1,000)

Commodity/ Destination	1990/91	1991/92	1992/93	1993/94	1994/95
Lettuce:	131,791	126,991	154,874	126,427	184,044
Canada	110,692	99,699	125,246	90,973	157,723
Hong Kong	6,796	7,047	10,072	11,515	9,275
Japan	761	5,644	4,761	6,746	4,565
Mexico	3,483	5,711	7,257	8,771	4,300
Singapore	837	877	1,144	1,681	2,643
Taiwan	1,133	1,144	1,263	1,468	1,752
United Kingdom	4,018	2,297	2,304	3,240	985
Others	4,071	4,572	2,827	2,033	2,801
Tomatoes:	111,487	118,605	133,835	114,144	109,688
Canada	103,327	112,912	116,545	103,630	100,431
Mexico	4,500	2,929	16,266	9,143	7,180
Hong Kong	726	747	362	717	533
United Kingdom	525	473	161	120	394
Leeward-Wind. Is.	106	115	105	75	133
Netherlands	1,209	987	62	0	109
Others	1,094	442	334	459	908

United States: Top Fresh Vegetable Exports, Fiscal Years 1990/91-94/95
(Value in \$1,000)
(continue)

Commodity/ Destination	1990/91	1991/92	1992/93	1993/94	1994/95
Onions:	62,297	61,297	80,313	85,538	131,872
Japan	6,081	4,562	11,683	17,661	52,318
Canada	36,552	40,029	48,103	39,560	45,430
Korea, Rep.	0	0	0	8,010	9,748
Mexico	9,110	9,008	10,001	7,170	5,621
Taiwan	1,866	1,537	2,984	3,634	4,204
Hong Kong	975	1,372	1,583	2,202	2,247
United Kingdom	1,783	1,914	3,238	2,497	2,154
Caribbean Countries	1,296	744	487	1,299	1,915
Australia	279	207	265	442	1,345
Former Soviet Union	0	0	4	280	1,375
Others	4,355	1,924	1,965	2,783	5,515
Broccoli:	52,178	55,882	69,470	80,197	91,261
Canada	39,635	38,348	45,890	38,203	49,751
Japan	11,080	15,537	20,560	36,623	35,385
Hong Kong	752	1,241	1,148	3,103	3,046
Taiwan	22	86	90	782	1,353
United Kingdom	175	81	1,208	319	217
Sweden	144	167	107	200	107
Others	370	422	467	967	1,402
Asparagus:	47,367	54,583	62,514	71,547	66,818
Japan	18,720	23,685	29,584	40,777	44,500
Canada	16,437	18,496	21,592	17,193	14,163
Switzerland	4,941	6,022	4,985	7,628	3,960
United Kingdom	1,750	1,628	1,134	1,546	1,361
Germany	2,342	1,906	2,466	1,973	1,205
Australia	366	207	231	547	238
Hong Kong	319	204	207	405	164
Others	2,492	2,435	2,315	1,478	1,427
Cauliflower:	42,776	48,508	49,628	61,799	73,676
Japan	8,068	16,184	15,666	31,243	38,621
Canada	32,825	30,400	31,985	27,553	31,781
Hong Kong	728	990	1,166	1,551	2,345
Others	1,137	934	811	1,452	3,274

United States: Top Fresh Vegetable Exports, Fiscal Years 1990/91-94/95
(Value in \$1,000)
(continue)

Commodity/ Destination	1990/91	1991/92	1992/93	1993/94	1994/95
Peppers:	46,131	45,647	48,485	44,885	48,727
Canada	44,896	43,822	45,445	42,030	47,094
Mexico	692	1,391	1,890	1,366	946
El Salvador	0	0	533	404	272
Japan	21	72	35	144	256
United Kingdom	140	65	139	231	38
Netherlands	17	69	116	138	11
Australia	71	72	75	127	0
Others	294	156	252	445	110
Celery:	40,405	39,424	51,059	37,956	57,181
Canada	33,800	30,232	42,391	27,856	44,776
Hong Kong	2,167	2,372	3,511	3,952	5,537
Taiwan	1,314	1,692	1,416	1,717	2,106
Singapore	699	684	765	790	1,706
United Kingdom	602	1,922	737	1,197	594
Mexico	465	410	921	667	416
Others	1,358	2,112	1,318	1,777	2,878

Source: U.S. Department of Commerce.

WORLD FRESH CITRUS SITUATION

Citrus exports in 1995/96 from selected countries in the Northern Hemisphere are forecast to approximate the previous year's level. Although Spain and the United States will continue to lead citrus exports from selected countries in the Northern Hemisphere, Spanish shipments are expected to decrease 10 percent, while U.S. exports are forecast to increase slightly to record 1.26 million tons. With continuing market promotion efforts, rising demand from leading U.S. customers, and the relaxation of import barriers in potential markets, U.S. citrus shipments should continue strong in 1995/96. Demand from Japan and Hong Kong is expected to account for most of the higher U.S. 1995/96 orange export forecast, while the EU could take most of the increase projected in grapefruit shipments. Citrus for processing in the Northern Hemisphere in 1995/96 is forecast to increase 1 percent to a record 14.83 million tons. The United States, which accounts for over 70 percent of total citrus processed in selected countries of the Northern Hemisphere, is forecast to process a record 10.56 million tons of citrus in 1995/96.

Northern Hemisphere

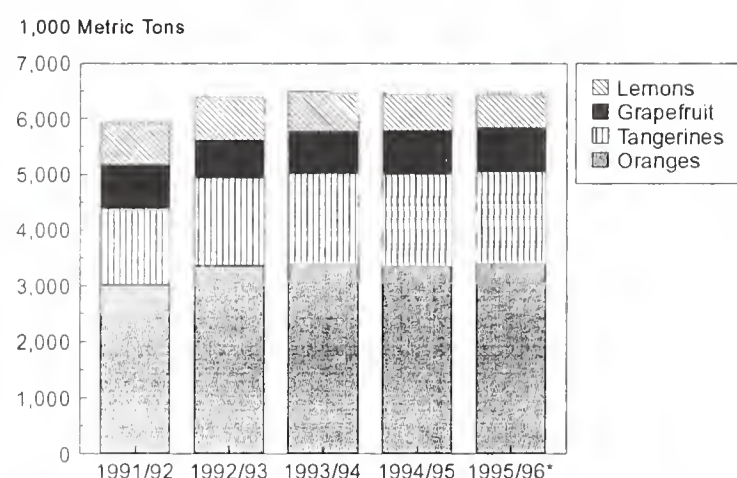
Total citrus production in selected major countries in the Northern Hemisphere in 1995/96 is forecast at 43.16 million metric tons, practically unchanged from last season's revised output. Increased citrus production in 1995/96 in the United States, China, Italy, and Japan is expected to offset declines in Spain, Mexico, Egypt, and Turkey. Northern Hemisphere orange production is forecast to decrease 1 percent in 1995/96 to 24.57 million tons, due to smaller orange crops in Spain, Mexico, and Egypt. Tangerine production in 1995/96, forecast at 11.0 million tons, is up 5 percent from 1994/95 mainly because of significant increases in the chief producing countries of China, Japan, and Korea. Grapefruit production is forecast at 3.47 million tons, down 3 percent from 1994/95 primarily because of a reduced crop in the United States. Larger lemon crops in Italy and the United States are expected to slightly increase lemon production in the Northern Hemisphere in

1995/96 to 2.72 million tons. Oranges and tangerines normally account for over 80 percent of total citrus produced in selected countries of the Northern Hemisphere. The United States, China, and Spain are the 3 leading citrus producing countries, in that order. The United States and Spain are major orange producers, while China harvests mostly tangerines.

Total fresh citrus exports in 1995/96 are forecast at 6.61 million tons, essentially unchanged from shipments of the previous two seasons. Spain and the United States are the major citrus exporters in the Northern Hemisphere. Spanish citrus exports in 1995/96 are forecast to decrease 10 percent to 2.52 million tons. Reduced orange and tangerine crops, which account for the bulk of Spain's citrus exports, will likely limit its citrus export availabilities in 1995/96. On the other hand, citrus shipments from the United States, which are dominated by oranges and grapefruit, are forecast at a record 1.26 million tons, up 2

percent from last year's shipments. Increasing promotion efforts, rising demand from leading U.S. customers, and the relaxation of import barriers in potential markets are expected to benefit U.S. citrus shipments in 1995/96. The majority of U.S. citrus exports will continue to go to traditional markets in the Far East, North America, mainly Canada, and the EU.

Oranges Continue to Dominate Exports of Fresh Citrus in Selected Countries in the Northern Hemisphere



Source: Reports from the U.S. Agricultural Attaches.

* Forecast

Citrus for processing in the Northern Hemisphere in 1995/96 is forecast to increase 1 percent to a record 14.83 million tons. The United States, which accounts for over 70 percent of total citrus processed in selected countries of the Northern Hemisphere, is forecast to process a record 10.56 million tons of citrus in 1995/96, mostly oranges. Although a smaller orange crop is expected in the state of Florida this season, larger quantities of California and Arizona oranges will be available for processing in 1995/96.

Mediterranean Basin

Spain

Total Spanish citrus production in 1995/96 is forecast at 4.57 million metric tons, down 8 percent from the revised 1994/95 output.

Drought throughout Spain's citrus growing areas at the beginning of the season adversely affected fruit sizes of early varieties. In addition, hailstorms at the end of August 1995 damaged fruit in Valencia Province, a major citrus area. Although drought has had a significant impact on the 1995/96 citrus crop, growers were able to avoid an even larger decline because new, high-yielding varieties have come into production in Andalucia. Additionally, the Government made an effort to divert what little irrigation water was available to the citrus industry. Orange production in Spain in 1995/96 is forecast down 6 percent to 2.48 million tons. Production of oranges is forecast to increase in Andalucia Province, but decrease slightly in the Levant area where many growers are switching to tangerine production (mostly Clementines) in response to increased demand. Although tangerine production is forecast down 5 percent this season to 1.67 million tons, the transition away from other types of citrus fruits to tangerines is expected to continue for the next few years as domestic and foreign demand for tangerines increases. Lemon output is forecast to decline 27 percent in 1995/96 to 414,000 tons, as more lemons are replaced with tangerine trees. Oranges account for about 55 percent of total Spanish citrus output. Tangerines and lemons account for about 35 and 10 percent respectively.

Spain's total citrus exports in 1995/96 are forecast at 2.52 million tons, 10 percent below revised 1994/95 shipments. Smaller orange and tangerine crops, which account for the bulk of Spain's citrus exports, will likely limit citrus export availabilities in 1995/96. The bulk of Spain's exports (about 80 percent) are expected to go to traditional markets in the European Union (EU) such as Germany, France, Holland, Belgium, and the United Kingdom. Orange exports in 1995/96 are estimated at 1.16 million tons, down 10 percent from last year. Navels account for approximately 70 percent of Spain's orange exports. Shipments of tangerines in 1995/96 are forecast at 1.12 million, 7 percent less than in 1994/95. On the other hand, lemon shipments in 1995/96 are forecast to decrease for the third consecutive year to 250,000 tons.

production), combined with the abundance of small, non-exportable fruit, will likely hamper Spanish lemon exports. EU subsidies for oranges and lemon exports to third countries will continue in the current season.

A USDA/APHIS preclearance inspection program is currently in operation at the port of Valencia for Spanish Clementine exports to the United States. Spanish citrus exports to the United States must comply with U.S. plant quarantine restrictions and with Food and Drug Administration (FDA) and Environmental Protection Agency (EPA) pesticide residue regulations.

Italy

Italian citrus production in 1995/96 is forecast to increase to 2.97 million tons, 8 percent above the drought-reduced 1994/95 crop, but 12 percent below the 1993/94 output. The orange, lemon, and tangerine crops are forecast to increase 4, 20, and 9 percent respectively in 1995/96. Despite the projected increase over 1994/95, Italy's citrus pack will likely be well-below average because of adverse weather during the spring fruit set and severe rains during the late-summer months. Similarly, fruit quality and sizes also are expected to be below average in 1995/96. Oranges (about 60 percent), lemons (25 percent), and tangerines (about 13 percent) account for the bulk of Italy's citrus output.

Italian citrus exports in 1995/96 are forecast at 227,000 tons, up 14 percent from last season's shipments. Increased citrus production and decreased export supplies in competing Mediterranean countries, such as Spain, will likely boost Italian citrus exports in 1995/96. Overall, Italy's role in the international citrus market has become marginal. Citrus exports, which go mostly to other EU markets, represented only about 7 percent of 1994/95 domestic production. Oranges, lemons, and tangerines account for the bulk of Italian citrus exports.

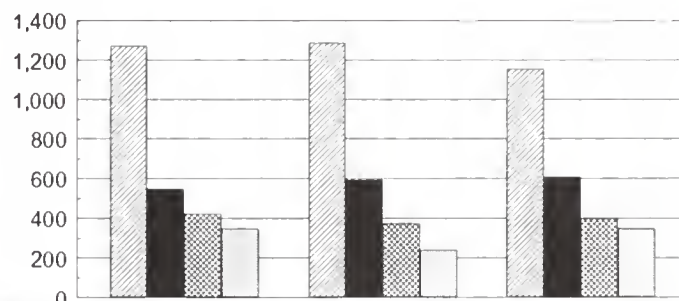
Italy's citrus imports in 1995/96 are forecast to decrease slightly to 149,000 tons. The new harmonized EU phytosanitary rules, implemented

in July 1993, which allowed entry of Spanish citrus into Italy for the first time, have not increased Italian citrus imports as much as previously anticipated. Nevertheless, about two thirds of citrus imports, mostly oranges, tangerines, and lemons, will be supplied by Spain. Grapefruit is the only citrus fruit allowed to enter Italy from non-EU countries. Imports of grapefruit from the United States have dropped significantly during recent years, the result of strong competition from lower-priced fruit from Israel, Cyprus, and South Africa.

Citrus for processing in 1995/96 is forecast to increase to 838,000 tons due to the higher

Spain is the World Leading Orange Exporter U.S. Orange Shipments Continue to Increase

1,000 Metric Tons



	1993/94	1994/95	1995/96*
Spain	1,275	1,290	1,155
United States	548	595	610
Greece	423	375	400
Morocco	348	238	350

Source: Reports from U.S. Agricultural Attaches.

* Forecast

production forecast. In the 1995/96 season, about 550,000 tons of oranges, 240,000 tons of lemons, 40,000 tons of tangerines, and 8,000 tons of other citrus are forecast to be processed. EU processing subsidies will continue to be available in 1995/96.

Egypt

Egyptian citrus production in 1995/96 is expected to decline 5 percent to 2.0 million tons. Orange production in 1995/96 is forecast at 1.36 million tons, down 10 percent from 1994/95, because of damage from the leaf miner pest and the ongoing replacement of navel trees with

1994/95, because of damage from the leaf miner pest and the ongoing replacement of navel trees with summer varieties which respond better to dry heat. The leaf miner insect, which appeared in Syria 3 years ago and is also known to be present in Israel, first appeared in Egypt last year. Growers anticipate the insect will cause some damage to the 1995/96 crop by attacking the trees' small leaves and deforming the fruit. Production of oranges accounts for nearly 70 percent of total Egyptian citrus production and is the single largest fruit crop produced in the country.

Most of Egypt's citrus production (about 90 percent) is directed to the fresh domestic market and around 9 percent, primarily oranges, is exported. Orange exports in 1995/96 are forecast to increase for the third consecutive year to 200,000 tons, 9 percent more than shipments in 1994/95, and 20,000 tons above exports in 1993/94. The increasing participation of the private sector in the export business has improved the quality of Egyptian citrus exports, and therefore, Egypt's image as a citrus exporter in the Mediterranean region. Presently, more than 30 private businesses are exporting citrus products although only 11 companies, in addition to the public sector company El-Wadi, control close to 98 percent of all orange exports. Saudi Arabia and countries in the Persian Gulf remain the major markets for Egyptian orange exports. The Egyptian orange export season normally extends from November to April. However, exports in the 1995/96 season began in October, due to the fact that packing houses initiated a new program of artificially coloring the fruit as a way of prolonging the export season.

Turkey

Total Turkish citrus production is forecast to decrease 5 percent in 1995/96 to 1.79 million tons, due to extremely hot weather during the growing season and dry winds which caused an unusually large fruit drop. However, the 1995/96 citrus production forecast represents the second largest crop on record as plantings continue to expand because of increased domestic and foreign demand. Orange

production, which accounts for about half of total Turkish citrus output, is forecast at 880,000 tons in 1995/96, down 4 percent from 1994/95. Tangerine and lemon output in 1995/96 are forecast to decrease 5 and 6 percent respectively.

The bulk of the Turkish citrus crop (about 70 percent) is consumed domestically in the fresh market, while the residual is mostly exported. Turkey's total citrus exports in 1995/96 are estimated at 365,000 tons, down 3 percent from 1994/95 shipments. A forecast decline in orange production, combined with increased competition from the domestic market, will likely reduce Turkey's citrus export availabilities in 1995/96. Lemons, oranges, and tangerines are the main citrus exported, accounting for about 35, 27, and 25 percent, respectively. Major markets for Turkish citrus exports include Saudi Arabia, Austria, United Kingdom, and Russia. The Turkish government subsidizes both the price of citrus exports as well as its transportation. Current citrus export prices are subsidized via a tax rebate equal to \$50 per ton. The transportation subsidy in 1995/96 was set at \$25 per ton for citrus exports to Europe and Africa, and \$35 per ton for exports to the Far East and North and South America. These are the same subsidy levels and conditions that prevailed in the 1994/95 season.

Fresh citrus imports in 1995/96 are forecast to increase substantially (more than 30 percent) to 50,000 tons. Turkey's citrus imports in 1995/96 are forecast to increase due to the expected smaller harvest. Oranges account for over 95 percent of Turkey's citrus imports and Cyprus is its largest supplier. A 5 percent duty and a 45 percent surcharge on the CIF value are applied to fresh citrus entering Turkey.

Greece

Greece's citrus production in 1995/96 is forecast at 1.09 million tons, unchanged from the 1994/95 output. Orange production in 1995/96 is forecast to increase marginally to 870,000 tons. Lemons and tangerines are forecast to decline 4 percent and 2 percent, respectively,

because of a shortage of irrigation water and reduced use of fertilizers. Oranges account for about 80 percent of total Greek citrus production. The principal orange varieties grown in Greece are Washington navels (66 percent), Common variety (17 percent), Valencia (10 percent) and Navelina (7 percent).

Total Greek citrus exports in 1995/96 are forecast to increase 6 percent to 460,000 tons. Orange exports, which normally account for over 85 percent of total Greek citrus shipments, are estimated at 400,000 tons in 1995/96, up 7 percent from exports in 1994/95, but 6 percent below the 1993/94 record volume. Exports of oranges and other citrus to EU countries have declined sharply, due to relatively poor quality of Greek citrus fruit, poor marketing, and increased competition from Spain and other Mediterranean countries. On the other hand, orange exports to Russia and to Eastern European countries have increased after the collapse of the previous state purchasing scheme and the adoption of a free market system. The EU continues to subsidize exports to Eastern European countries, including shipments to Russia.

Morocco

Total citrus production in Morocco in 1995/96 is forecast at 1.26 million tons, up 27 percent from the 1994/95 output, due mainly to the alternate bearing cycle of Morocco's citrus trees. Orange production is forecast at 870,000 tons, up 32 percent from last year. Between 65 and 70 percent of Moroccan citrus production consists of oranges (mainly navels and Maroc-Late) and 30 to 35 percent are tangerines (Clementines). Production of lemons and grapefruit is very limited.

Moroccan total citrus exports, which are dominated by oranges and tangerines, are forecast to increase in line with production in 1995/96. Exports of oranges, which normally account for about 60 percent of total citrus shipments, are estimated at 350,000 tons in 1995/96, up almost 50 percent from 1994/95 shipments. Exports of tangerines, the second

most important citrus exported, are forecast to increase to 190,000 tons in 1995/96 from the 142,000 tons the year before. The majority of Morocco's citrus exports, which absorb the best quality fruit and usually provide the highest return, continue to go to markets in the EU. About 85 percent of orange exports and 70 percent of Clementines shipments go to EU countries. Other important markets include Canada, Norway, and Saudi Arabia. However, as Morocco tries to diversify further its citrus export markets, expansion recently has been made to Eastern European countries, such as Poland and Russia.

Oranges for processing are forecast to increase sharply in 1995/96 to 130,000 tons based on the expected larger orange crop. Moreover, the smaller fruit size of clementines this year, combined with a likely drop in prices in the local fresh market, should result in a higher share of clementines being processed. Prices of citrus destined for processing are normally set in advance by the sole processor FRUMAT. These prices vary considerably from one season to another based on availability of fruit and on the price of frozen concentrated orange juice (FCOJ).

Cyprus

Cyprus' citrus output in 1995/96 is expected to increase to 402,000 tons, 25 percent above 1994/95, mainly due to a larger orange crop forecast. Orange production, which accounts for more than half of Cyprus' citrus output, is forecast to increase to 252,000 tons in 1995/96 compared to 166,000 produced in 1994/95. Weather during the growing season was generally good resulting in good flowering and fruit set. However, increasing production costs could limit citrus production in 1995/96. In response to this situation, the government of Cyprus remunerates producers based on production costs per hectare, while the authorities in Northern Cyprus establishes a minimum price per ton, also based on perceived production costs.

Citrus exports in 1995/96 are forecast at 227,000 tons, up almost 40 percent from the

year before, due to the expected larger citrus crop. Citrus exports are expected to go to traditional markets in the EU, mainly the United Kingdom, and to Turkey. However, higher exportable supplies in lower cost Mediterranean producing countries, such as Morocco, should improve the competitiveness of Cyprus' exports.

Other Northern Hemisphere Countries

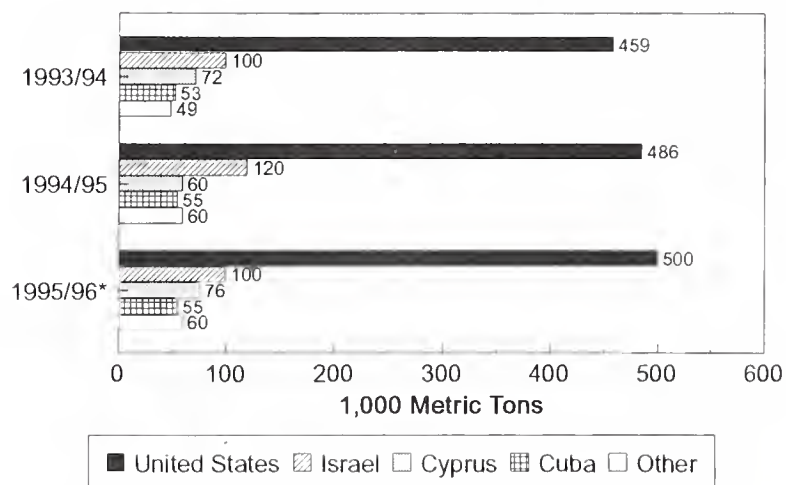
United States

Total citrus production in the United States in 1995/96 is forecast at 14.64 million tons, up 1 percent from last season's harvest, the second largest on record. If realized, the U.S. 1995/96 citrus crop will be the largest crop since the 1979/80 record of 14.97 tons. Orange production in 1995/96 is forecast at 10.74 million tons, up 1 percent from 1994/95. Florida experienced above-average rainfall during the late-summer and early-fall months due to tropical storms which adversely affected citrus crops. Slightly lower orange production in Florida in 1995/96 will be offset by increased production prospects in California and Arizona. The 1995/96 grapefruit crop is forecast to decrease 4 percent to 2.54 million tons. The average grapefruit size in Florida is large and fruit quality is good. Improved weather in California and Arizona helped boost prospects for the 1995/96 U.S. lemon crop.

Total U.S. citrus exports in 1995/96 are forecast at 1.26 million tons, 2 percent above the previous year's shipments. Exports of oranges in 1995/96 are forecast at 610,000 tons, 3 percent above last year's record exports and nearly 25 percent more than the amount shipped 5 years ago. U.S. grapefruit exports in 1995/96, also expected to be the largest on record, are forecast at 500,000 tons. The reported good quality of the fruit is anticipated to boost U.S. total grapefruit exports in 1995/96. Orange and grapefruit exports account for about 90 percent of total U.S. citrus sales in international markets. Continuing Market Promotion Program efforts, increasing demand from leading U.S. customers, and the elimination of import barriers in

international markets are expected to continue to benefit U.S. orange and grapefruit shipments in 1995/96.

U.S. Account for Over 60 Percent of Northern Hemisphere Grapefruit Exports



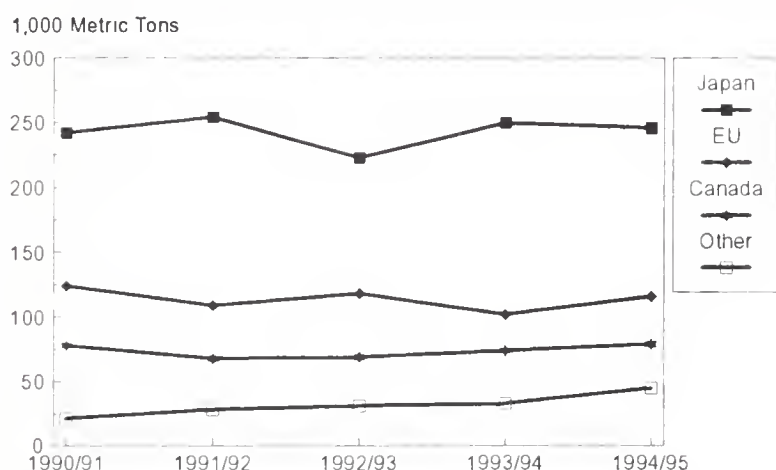
Source: Reports from U.S. Agricultural Attaches.
* Forecast

U.S. citrus exports in 1994/95, boosted by record shipments of oranges and grapefruits, reached 1.23 million tons, up 7 percent from the previous season's shipments. Strong demand continues from major U.S. customers in the Far East, North America, and the EU. Orange exports to Asian countries in 1994/95 increased 10 percent, boosted by higher demand in Japan and Hong Kong, the major customers in the region. Greater orange shipments in 1994/95 were also assisted by increased shipments to Korea, the result of a 15,000 ton tariff-rate quota agreed upon in the Uruguay Round. On the other hand, orange exports to Canada did not bounce back as earlier expected. Grapefruit exports also continued to grow in 1994/95 as shipments to the EU, and Canada increased 14 and 4 percent, respectively. U.S. grapefruit exports to Japan, the United States' largest market, fell slightly in 1994/95. U.S. exports of other citrus in 1994/95 approximated the previous season's level.

U.S. citrus for processing in 1995/96 is forecast at 10.56 million tons, up slightly from last year's

record. No significant change is expected in processing of oranges in 1995/96 as smaller supplies from Florida will be offset by larger quantities of California and Arizona oranges available for processing. On the other hand, the amount of grapefruit for processing will likely decrease in 1995/96 because of the expected smaller grapefruit crop. Processing of lemons is forecast to increase more than 25 percent in 1995/96.

Japan Accounted for 51 Percent of Total U.S. Fresh Grapefruit Exports in MY 1994/95*



* Marketing Year: September-August
Source: U.S. Bureau of Census

China

China's citrus production in 1995/96 is forecast to increase for the fifth consecutive year to 6.39 million tons, up 6 percent from the record 1994/95 output. The orange and tangerine crops for 1995/96 are projected up 6 percent, to an all-time high of 1.73 million and 4.67 million tons, respectively. Although production in Guangdong Province (once the leading producer) is trending downward, increases elsewhere in China continue to more than offset this decline. In Guangdong, citrus trees, especially for oranges, have been uprooted and replaced with more profitable commodities such as lychees or vegetables. Total citrus output in other areas of China is expected to continue expanding at about 5 percent annually through the end of the

century as new plantings mature. Around 67 percent of total Chinese citrus production is comprised of tangerines, 24 percent is oranges, and the remainder is grapefruit, lemons, and other citrus. Citrus accounts for 20 percent of total Chinese fruit production. The majority of China's citrus production is consumed fresh in the domestic market while about 5 percent or less is processed, mostly canned.

Total Chinese citrus exports, mostly tangerines, are forecast at 148,000 tons in 1995/96 compared to 134,000 exported in 1994/95. Tangerine exports are forecast at 130,000 tons, up 11 percent from 1994/95. Virtually all tangerine exports are of the "mandarin" type. Russia and Southeast Asian countries are the leading export markets for Chinese citrus.

Although fresh citrus imports face phytosanitary barriers and high tariffs, U.S. (navels), South African (valencias), and Australian (valencias) oranges entered through "unofficial" channels and are widely available in most big cities. U.S. citrus is officially banned by China's designation of the United States as a medfly country. U.S.-China bilateral scientific exchanges and negotiations to end this ban continue. However, high import duties for fresh and processed citrus products could continue to hamper entry of U.S. citrus into China. Chinese demand for citrus is strong. Increasingly affluent urban consumers demand the variety and quality provided by imported citrus.

Mexico

Mexico's citrus production in 1995/96 is forecast at 3.81 million tons, down 14 percent from last season's record output, estimated at 4.46 million tons. Production of oranges, tangerines, and grapefruit is forecast to decline in 1995/96 because of an "off-year" in the biennial bearing cycle, dry weather in the northern producing states, and reduced input use because of higher costs. The rate of growth in area planted has slowed because of the high cost of production and high interest rates on loans. Producers have reduced input use in all citrus areas as they continue to face financial

problems. Nevertheless, due to more trees coming into production, the Mexican lime crop in 1995/96 is forecast to increase for the fifth consecutive year and reach 835,000 tons. Oranges and limes (both Key and Persian limes) are the chief citrus crops in Mexico accounting for about 70 percent and 20 percent respectively.

Mexico's citrus exports are forecast at 152,000 tons in 1995/96, 3 percent above shipments in 1994/95. Lime exports, which account for about 90 percent of total Mexican citrus shipments, are forecast to increase in 1995/96 because of the peso devaluation. Mexican Persian limes supply about one-half of the U.S. and Canadian markets.

The bulk of Mexico's citrus crop is produced for the fresh domestic market, with most of the residual going to the processing plants. However, the amount of citrus processed depends heavily on the relative prices of fresh oranges in the domestic market and the international price of FCOJ. Processing of citrus is forecast to decrease 23 percent in 1995/96, mainly because of the expected smaller orange crop and financial problems the industry is facing. Processing of oranges in 1994/95 is estimated at a record 700,000 tons, more than double the amount processed in the 1993/94 season. Attractive international FCOJ prices, the peso devaluation, increased FCOJ exports to the United States under the NAFTA agreement, and reduced domestic demand for fresh oranges, due to the recession, boosted Mexico's oranges for processing in 1994/95. Most of the oranges that processors use for juice come from the December-April harvest because this fruit has the necessary color and sugar-to-acid ratio.

Japan

Japanese total citrus production in 1995/96 is forecast at 1.84 million tons, 9 percent above the 1993/94 output. The tangerine crop, which accounts for more than 90 percent of total citrus produced in Japan, is forecast up 10 percent from last season's heat and drought-reduced crop. However, a declining trend in tangerine

planted area is expected to continue in 1995/96. Increased imports of inexpensive oranges and grapefruit have discouraged tangerine plantings in Japan. Unshu Mikan varieties (satsuma) account for 85 percent of Japanese tangerine production. The balance consists of Hassaku and lyokan varieties.

Japan's total citrus imports are forecast to increase again in 1995/96. Grapefruit and orange imports, which account for over 80 percent of total Japanese international demand, are forecast to increase 4 percent and 5 percent, respectively, in 1995/96. The United States remains by far the dominant supplier of fresh oranges, grapefruit and lemons to Japan. Continued declines in Japanese fresh fruit production, combined with good quality and favorable prices of U.S. citrus, have increased the market share of citrus from the United States in the Japanese market. Retailers' promotional activities and a continued favorable dollar/yen exchange rate will likely continue to increase U.S. citrus exports to Japan in 1995/96. However, the United States faced competition from Australian and South African oranges and from Israeli grapefruit. Fresh grapefruit imports from Israel in the 1994/95 season surged dramatically (nearly 90 percent) over the previous year. Moreover, Israeli grapefruit has steadily increased its market share in Japan for the last few years. Israel holds one distinct advantage over U.S. grapefruit; Israeli shipments can reach the Japanese market before the Christmas and New Year holiday seasons, when Florida and California fresh grapefruit is not yet ready to be marketed at prime quality.

Korea

Korean tangerine production in 1995/96 is forecast at 625,000 tons, up 14 percent from 1994/95 because of improved weather following last year's drought. Planted area in 1995/96 is forecast at 21,600 hectares, up slightly from 1994/95. However, producers in Cheju Province are expected to continue a vigorous tree-thinning program. This program comes as a result of growers' decisions to improve tangerine quality in order to compete with high-quality orange

imports. Cheju Province accounts for more than 90 percent of total Korean tangerine production. Traditionally, most domestic tangerines are consumed fresh.

Korea is expected to export 2,000 tons of tangerines in 1995/96, compared to 1,000 shipped in 1994/95. Canada and Russia are the main destinations for Korean tangerines. Korea obtained USDA/APHIS approval last year to export tangerines to the United States under guidelines in the official protocol agreement. The protocol prohibits the distribution of Korean citrus to citrus-producing states in the United States due to citrus canker. Korea's goal is to export between 1,000 to 1,500 tons of tangerines to the United States, mainly to the Korean-American population in the Midwestern and Northeastern states.

Korea imported oranges for the first time, other than for the hotel trade, in 1994/95 under terms of its Uruguay Round agreement. A total quota of 15,000 tons for oranges and grapefruit was assigned in 1994/95. U.S. orange and grapefruit exports to Korea increased sharply in 1994/95 as the result of this agreement. The Korean quota is 20,000 tons for the 1995/96 season and will increase to 25,000 tons during the first 6 months of 1997 until complete liberalization in July 1997.

Revised Southern Hemisphere

It is still too early to make reliable forecasts for the Southern Hemisphere countries for the 1995/96 season (harvest in 1996).

Total citrus production in selected countries in the Southern Hemisphere in 1994/95 (harvest in 1995) has been revised up from the July forecast to 20.45 million tons. In **Brazil**, the 1995 orange crop for the entire country has been revised to 15.71 million tons, 4 percent above the July forecast, but down 1 percent from the August estimate. Production in the Sao Paulo commercial citrus zone is forecast at 13.88 million tons (340 million boxes), up 6 percent from the July forecast, but 1 percent

below the amount estimated in August. The larger August estimate was based on an industry tree census in Sao Paulo State that revised the estimate of bearing tree numbers from 156.0 million to 163.0 million. The current lower estimate results from smaller fruit sizes and increased fruit drop because of dry weather from July through October. Sao Paulo State accounts for 88 percent of Brazil's total orange production.

South Africa's 1994/95 citrus crop has been revised up 4 percent to 987,000 tons. Increased production in Natal and the Eastern and Western Cape more than offset reduced output in the drought-stricken Northern Province. Total 1994/95 citrus production in **Argentina** was lowered 1 percent to 1.96 million tons. A short, cold winter with frequent frosts was followed by prolonged drought, which sharply reduced the Valencia orange crop.

On the other hand, total citrus exports in 1995 from selected countries in the Southern Hemisphere are estimated at 1.02 million tons, up 5 percent from the July estimate (see July issue of **World Horticultural Trade & U.S. Export Opportunities**). Increased citrus exports are forecast in **Argentina** and **South Africa**. Argentina's citrus exports in 1995 have been revised up to a record 257,000 tons, due to good export demand from major markets in Europe and Asia. Also, Brazilian and Chilean relaxation of phytosanitary barriers will likely help Argentine lemon shipments to those countries. In South Africa, citrus exports in 1994/95 are estimated to have increased in line with the higher production forecast.

For further information on supply, distribution, and trade contact Samuel Rosa, Horticultural and Tropical Products Division, (202) 720-6086. For information on Production contact Kelly Strzelecki, Production Estimates and Crop Assessment Division at (202) 720-6791.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1993/94-1995/96 1/
(1,000 METRIC TONS)
TABLE 1: TOTAL CITRUS

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
Northern Hemisphere						
Mediterranean Basin						
Cyprus						
	1993/94	317	0	177	41	99
	1994/95	301	0	163	43	95
	1995/96	402	0	227	53	122
Egypt						
	1993/94	1,856	0	196	1,644	16
	1994/95	2,113	0	193	1,904	16
	1995/96	2,010	0	217	1,777	16
Gaza						
	1993/94	104	0	95	9	0
	1994/95	104	0	95	9	0
	1995/96	104	0	95	9	0
Greece						
	1993/94	1,062	3	481	418	166
	1994/95	1,092	4	433	415	248
	1995/96	1,090	3	460	411	222
Israel						
	1993/94	853	43	272	202	412
	1994/95	1,003	36	358	226	455
	1995/96	1,040	35	287	270	518
Italy						
	1993/94	3,387	119	230	2,399	877
	1994/95	2,763	154	199	1,918	800
	1995/96	2,974	149	227	2,058	838
Morocco						
	1993/94	1,324	0	578	530	216
	1994/95	997	0	382	580	35
	1995/96	1,264	0	542	572	150
Spain						
	1993/94	4,764	3	2,747	1,353	667
	1994/95	4,980	29	2,801	1,407	801
	1995/96	4,573	29	2,521	1,378	703
Turkey						
	1993/94	1,733	11	353	1,218	173
	1994/95	1,880	38	378	1,349	191
	1995/96	1,790	50	365	1,291	184
Subtotal Mediterranean Basin						
	1993/94	15,400	179	5,129	7,814	2,626
	1994/95	15,233	261	5,002	7,851	2,641
	1995/96	15,247	266	4,941	7,819	2,753
Other Northern Hemisphere						
China, Peoples Republic of						
	1993/94	5,840	0	118	5,428	294
	1994/95	6,056	0	134	5,619	303
	1995/96	6,392	2	148	5,927	319
Cuba						
	1993/94	602	0	93	327	182
	1994/95	600	0	95	323	182
	1995/96	600	0	95	323	183
Japan						
	1993/94	1,913	562	11	2,227	237
	1994/95	1,683	566	6	2,148	95
	1995/96	1,837	587	10	2,169	245

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES

1993/94-1995/96 1/
(1,000 METRIC TONS)
TABLE 1: TOTAL CITRUS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
Northern Hemisphere					
Korea, Republic of					
1993/94	619	0	1	549	69
1994/95	549	15	1	532	31
1995/96	625	20	2	571	72
Mexico					
1993/94	4,274	3	136	3,604	537
1994/95	4,458	3	147	3,410	904
1995/96	3,812	3	152	2,965	698
United States					
1993/94	13,202	170	1,156	2,989	9,227
1994/95	14,501	194	1,234	2,996	10,465
1995/96	14,644	196	1,264	3,020	10,556
Subtotal Other Northern Hemisphere					
1993/94	26,450	735	1,515	15,124	10,546
1994/95	27,847	778	1,617	15,028	11,980
1995/96	27,910	808	1,671	14,975	12,073
Total Northern Hemisphere					
1993/94	41,850	914	6,644	22,938	13,172
1994/95	43,080	1,039	6,619	22,879	14,621
1995/96	43,157	1,074	6,612	22,794	14,826
Southern Hemisphere					
Argentina					
1993/94	1,988	7	231	1,075	689
1994/95	1,960	7	257	1,008	702
1995/96	NA	NA	NA	NA	NA
Australia					
1993/94	622	8	99	177	354
1994/95	505	12	84	174	258
1995/96	NA	NA	NA	NA	NA
Brazil					
1993/94	15,086	0	152	4,565	10,369
1994/95	17,000	0	95	6,937	9,968
1995/96	NA	NA	NA	NA	NA
South Africa 4/					
1993/94	974	0	576	181	217
1994/95	987	0	581	182	224
1995/96	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1993/94	18,670	15	1,058	5,998	11,629
1994/95	20,452	19	1,017	8,301	11,152
1995/96	NA	NA	NA	NA	NA
Total World					
1993/94	60,520	929	7,702	28,936	24,801
1994/95	63,532	1,058	7,636	31,180	25,773
1995/96	NA	NA	NA	NA	NA

1/ Forecast

2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

4/ Includes Swaziland plus very small quantities of citrus from Botswana, Mozambique, and Zimbabwe which are marketed through the South African Citrus Board.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1993/94-1995/96 1/
(1,000 METRIC TONS)
TABLE 2: SWEET ORANGES

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processed
Northern Hemisphere						
Mediterranean Basin						
Cyprus						
	1993/94	160	0	75	26	59
	1994/95	166	0	76	30	60
	1995/96	252	0	126	40	86
Egypt						
	1993/94	1,324	0	179	1,137	8
	1994/95	1,513	0	183	1,322	8
	1995/96	1,360	0	200	1,152	8
Gaza 4/						
	1993/94	87	0	81	6	0
	1994/95	87	0	81	6	0
	1995/96	87	0	81	6	0
Greece						
	1993/94	854	1	423	283	149
	1994/95	865	2	375	268	224
	1995/96	870	1	400	271	200
Israel						
	1993/94	365	33	150	98	150
	1994/95	405	28	200	110	123
	1995/96	460	20	150	140	190
Italy						
	1993/94	2,100	41	153	1,438	550
	1994/95	1,710	45	129	1,116	510
	1995/96	1,770	45	150	1,115	550
Morocco						
	1993/94	916	0	348	379	189
	1994/95	657	0	238	384	35
	1995/96	870	0	350	390	130
Spain						
	1993/94	2,509	3	1,275	857	380
	1994/95	2,644	24	1,290	871	507
	1995/96	2,481	24	1,155	850	500
Turkey						
	1993/94	840	11	86	681	84
	1994/95	920	36	111	750	95
	1995/96	880	50	100	737	93
Subtotal Mediterranean Basin						
	1993/94	9,155	89	2,770	4,905	1,569
	1994/95	8,967	135	2,683	4,857	1,562
	1995/96	9,030	140	2,712	4,701	1,757
Other Northern Hemisphere						
China						
	1993/94	1,575	0	18	1,476	81
	1994/95	1,633	0	17	1,534	82
	1995/96	1,725	2	18	1,623	86
Cuba						
	1993/94	350	0	40	235	75
	1994/95	350	0	40	235	75
	1995/96	350	0	40	235	75
Japan						
	1993/94	33	189	0	220	2
	1994/95	30	185	0	213	2
	1995/96	28	195	0	221	2

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1993/94-1995/96 1/
(1,000 METRIC TONS)
TABLE 2: SWEET ORANGES

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
Other Northern Hemisphere					
Mexico					
1993/94	3,174	1	2	2,833	340
1994/95	3,300	1	7	2,594	700
1995/96	2,700	1	7	2,194	500
United States 5/					
1993/94	9,462	16	548	1,594	7,336
1994/95	10,641	17	595	1,560	8,503
1995/96	10,741	15	610	1,586	8,560
Subtotal Other Northern Hemisphere					
1993/94	14,594	206	608	6,358	7,834
1994/95	15,954	203	659	6,136	9,362
1995/96	15,544	213	675	5,859	9,223
Total Northern Hemisphere					
1993/94	23,749	295	3,378	11,263	9,403
1994/95	24,921	338	3,342	10,993	10,924
1995/96	24,574	353	3,387	10,560	10,980
Southern Hemisphere					
Argentina					
1993/94	746	1	81	514	152
1994/95	720	1	83	478	160
1995/96	NA	NA	NA	NA	NA
Australia					
1993/94	588	6	95	160	339
1994/95	470	10	80	157	243
1995/96	NA	NA	NA	NA	NA
Brazil					
1993/94	13,710	0	140	3,430	10,140
1994/95	15,710	0	82	5,878	9,750
1995/96	NA	NA	NA	NA	NA
South Africa 6/					
1993/94	770	0	445	159	166
1994/95	770	0	445	159	166
1995/96	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1993/94	15,814	7	761	4,263	10,797
1994/95	17,670	11	690	6,672	10,319
1995/96	NA	NA	NA	NA	NA
Total World					
1993/94	39,563	302	4,139	15,526	20,200
1994/95	42,591	349	4,032	17,665	21,243
1995/96	NA	NA	NA	NA	NA

1/ Forecast

2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

4/ Tangerine production is small and is included with oranges.

5/ Includes Temples 6/ Includes small quantities of tangerines.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1993/94-1995/96 1/
(1,000 METRIC TONS)
TABLE 3: FRESH TANGERINES

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processing
Northern Hemisphere						
Mediterranean Basin						
Egypt	1993/94	205	0	9	193	3
	1994/95	250	0	0	247	3
	1995/96	300	0	2	295	3
Greece	1993/94	71	0	10	59	2
	1994/95	87	0	18	67	2
	1995/96	85	0	20	63	2
Israel	1993/94	85	0	15	40	20
	1994/95	117	0	30	50	37
	1995/96	125	0	30	60	35
Italy	1993/94	509	31	30	491	19
	1994/95	468	54	24	463	35
	1995/96	510	50	30	490	40
Morocco 4/	1993/94	373	0	229	119	25
	1994/95	304	0	142	162	0
	1995/96	360	0	190	150	20
Spain	1993/94	1,631	0	1,115	344	172
	1994/95	1,751	1	1,196	381	175
	1995/96	1,665	1	1,116	380	170
Turkey	1993/94	405	0	87	277	41
	1994/95	430	0	102	285	43
	1995/96	410	0	100	269	41
Subtotal Mediteranean Basin						
	1993/94	3,279	31	1,495	1,523	282
	1994/95	3,407	55	1,512	1,655	295
	1995/96	3,455	51	1,488	1,707	311
Other Northern Hemisphere						
China	1993/94	4,265	0	100	3,952	213
	1994/95	4,423	0	117	4,085	221
	1995/96	4,667	0	130	4,304	233
Cuba	1993/94	6	0	0	6	0
	1994/95	6	0	0	6	0
	1995/96	6	0	0	6	0
Japan 5/	1993/94	1,751	8	11	1,516	232
	1994/95	1,539	7	6	1,450	90
	1995/96	1,696	7	10	1,453	240
South Korea	1993/94	619	0	1	549	69
	1994/95	549	15	1	532	31
	1995/96	625	20	2	571	72

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES

1993/94-1995/96 1/ (1,000 METRIC TONS) TABLE 3: FRESH TANGERINES

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processing
Other Northern Hemisphere					
Mexico					
1993/94	165	0	4	143	18
1994/95	180	0	4	156	20
1995/96	145	0	4	126	15
United States 6/					
1993/94	425	19	24	250	170
1994/95	378	15	20	230	143
1995/96	406	15	20	240	161
Subtotal Other Northern Hemisphere					
1993/94	7,231	27	140	6,416	702
1994/95	7,075	37	148	6,459	505
1995/96	7,545	42	166	6,700	721
Total Northern Hemisphere					
1993/94	10,510	58	1,635	7,939	984
1994/95	10,482	92	1,660	8,114	800
1995/96	11,000	93	1,654	8,407	1,032
Southern Hemisphere					
Argentina					
1993/94	394	0	29	332	33
1994/95	393	0	30	330	33
1995/96	NA	NA	NA	NA	NA
Brazil 7/					
1993/94	620	0	8	492	120
1994/95	560	0	8	432	120
1995/96	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1993/94	1,014	0	37	824	153
1994/95	953	0	38	762	153
1995/96	NA	NA	NA	NA	NA
Total World					
1993/94	11,524	58	1,672	8,763	1,137
1994/95	11,435	92	1,698	8,876	953
1995/96	NA	NA	NA	NA	NA

1/ Forecast

2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

4/ Clementines only

5/ Mainly satsumas (also called mandarin or unshu mikan, but also including mandarin hybrids).

6/ Includes tangelos which account for about half of combined tangerine and tangelo production. Export data include mandarins

7/ State of Sao Paulo only, which apparently accounts for over-half of Brazil's production. About 120,000 tons of tangerines, which are processed, are included in the orange table.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1993/94-1995/96 1/
(1,000 METRIC TONS)
TABLE 4: FRESH GRAPEFRUITS

Country/Year 3/		Production	Imports	Exports	Consumption 2/	Processing
Northern Hemisphere Mediterranean Basin						
Cyprus	1993/94	112	0	72	5	35
	1994/95	95	0	60	5	30
	1995/96	112	0	76	5	31
Gaza	1993/94	9	0	7	2	0
	1994/95	9	0	7	2	0
	1995/96	9	0	7	2	0
Israel	1993/94	344	5	100	25	224
	1994/95	415	5	120	30	270
	1995/96	395	5	100	35	265
Italy	1993/94	7	37	5	39	0
	1994/95	5	46	7	44	0
	1995/96	6	46	7	45	0
Turkey	1993/94	48	0	36	8	4
	1994/95	60	0	45	9	6
	1995/96	60	0	45	9	6
Subtotal Mediterranean Basin						
	1993/94	520	42	220	79	263
	1994/95	584	51	239	90	306
	1995/96	582	51	235	96	302
Other Northern Hemisphere						
Cuba	1993/94	232	0	53	74	105
	1994/95	230	0	55	70	105
	1995/96	230	0	55	70	105
Japan	1993/94	0	273	0	273	0
	1994/95	0	280	0	280	0
	1995/96	0	290	0	290	0
Mexico	1993/94	112	0	1	77	34
	1994/95	136	0	1	100	35
	1995/96	120	0	1	85	34
United States	1993/94	2,414	15	459	715	1,255
	1994/95	2,642	13	486	729	1,440
	1995/96	2,537	13	500	696	1,354
Subtotal Other Northern Hemisphere						
	1993/94	2,758	288	513	1,139	1,394
	1994/95	3,008	293	542	1,179	1,580
	1995/96	2,887	303	556	1,141	1,493

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES

1993/94-1995/96 1/
(1,000 METRIC TONS)
TABLE 4: FRESH GRAPEFRUITS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processing
Total Northern Hemisphere					
1993/94	3,278	330	733	1,218	1,657
1994/95	3,592	344	781	1,269	1,886
1995/96	3,469	354	791	1,237	1,795
Southern Hemisphere					
Argentina					
1993/94	195	6	26	111	64
1994/95	197	5	34	105	63
1995/96	NA	NA	NA	NA	NA
South Africa, Republic of					
1993/94	145	0	99	15	31
1994/95	154	0	98	16	40
1995/96	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1993/94	340	6	125	126	95
1994/95	351	5	132	121	103
1995/96	NA	NA	NA	NA	NA
Total World					
1993/94	3,618	336	858	1,344	1,752
1994/95	3,943	349	913	1,390	1,989
1995/96	NA	NA	NA	NA	NA

1/ Forecast

2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES

1993/94-1995/96 1/
(1,000 METRIC TONS)
TABLE 5: FRESH LEMONS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processing
Northern Hemisphere					
Mediterranean Basin					
Cyprus					
1993/94	45	0	30	10	5
1994/95	40	0	27	8	5
1995/96	38	0	25	8	5
Gaza					
1993/94	8	0	7	1	0
1994/95	8	0	7	1	0
1995/96	8	0	7	1	0
Greece					
1993/94	137	2	48	76	15
1994/95	140	2	40	80	22
1995/96	135	2	40	77	20
Israel					
1993/94	28	5	3	24	6
1994/95	26	3	3	21	5
1995/96	20	10	2	20	8
Italy					
1993/94	743	10	42	431	280
1994/95	565	9	39	295	240
1995/96	680	8	40	408	240
Morocco					
1993/94	20	0	1	19	0
1994/95	20	0	0	20	0
1995/96	20	0	0	20	0
Spain					
1993/94	611	0	354	152	105
1994/95	571	4	315	155	105
1995/96	414	4	250	148	20
Turkey					
1993/94	440	0	144	252	44
1994/95	470	2	120	305	47
1995/96	440	0	120	276	44
Subtotal Mediteranean Basin					
1993/94	2,032	17	629	965	455
1994/95	1,840	20	551	885	424
1995/96	1,755	24	484	958	337
Other Northern Hemisphere					
Japan					
1993/94	0	92	0	92	0
1994/95	0	94	0	94	0
1995/96	0	95	0	95	0
Mexico					
1993/94	10	1	0	1	10
1994/95	12	1	0	1	12
1995/96	12	1	0	1	12
United States					
1993/94	893	8	122	315	464
1994/95	831	11	130	343	369
1995/96	948	13	130	360	471

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES
1993/94-1995/96 1/
(1,000 METRIC TONS)
TABLE 5: FRESH LEMONS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processing
Subtotal Other Northern Hemisphere					
1993/94	903	101	122	408	474
1994/95	843	106	130	438	381
1995/96	960	109	130	456	483
Total Northern Hemisphere					
1993/94	2,935	118	751	1,373	929
1994/95	2,683	126	681	1,323	805
1995/96	2,715	133	614	1,414	820
Southern Hemisphere					
Argentina					
1993/94	653	0	95	118	440
1994/95	650	1	110	95	446
1995/96	NA	NA	NA	NA	NA
Australia					
1993/94	34	2	4	17	15
1994/95	35	2	4	17	16
1995/96	NA	NA	NA	NA	NA
Brazil 4/					
1993/94	63	0	3	0	60
1994/95	67	0	4	0	63
1995/96	NA	NA	NA	NA	NA
South Africa, Republic of					
1993/94	59	0	32	7	20
1994/95	63	0	38	7	18
1995/96	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1993/94	809	2	134	142	535
1994/95	815	3	156	119	543
1995/96	NA	NA	NA	NA	NA
Total World					
1993/94	3,744	120	885	1,515	1,464
1994/95	3,498	129	837	1,442	1,348
1995/96	NA	NA	NA	NA	NA

1/ Forecast

2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of lemons usually begins earlier and often extends throughout the year.

4/ State of Sao Paulo only.

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES

1993/94-1995/96 1/
(1,000 METRIC TONS)
TABLE 6: OTHER CITRUS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
Northern Hemisphere Mediterranean Basin					
Egypt 4/					
1993/94	327	0	8	314	5
1994/95	350	0	10	335	5
1995/96	350	0	15	330	5
Israel					
1993/94	31	0	4	15	12
1994/95	40	0	5	15	20
1995/96	40	0	5	15	20
Italy 5/					
1993/94	28	0	0	0	28
1994/95	15	0	0	0	15
1995/96	8	0	0	0	8
Morocco					
1993/94	15	0	0	13	2
1994/95	16	0	2	14	0
1995/96	14	0	2	12	0
Spain 6/					
1993/94	13	0	3	0	10
1994/95	14	0	0	0	14
1995/96	13	0	0	0	13
Subtotal Mediterranean Basin					
1993/94	414	0	15	342	57
1994/95	435	0	17	364	54
1995/96	425	0	22	357	46
Other Northern Hemisphere					
Cuba 4/					
1993/94	14	0	0	12	2
1994/95	14	0	0	12	2
1995/96	14	0	0	12	2
Japan 7/					
1993/94	129	0	0	126	3
1994/95	114	0	0	111	3
1995/96	113	0	0	110	3
Mexico 8/					
1993/94	813	1	129	550	135
1994/95	830	1	135	559	137
1995/96	835	1	140	559	137
United States 8/					
1993/94	8	112	3	115	2
1994/95	9	138	3	134	10
1995/96	12	140	4	138	10
Subtotal Other Northern Hemisphere					
1993/94	964	113	132	803	142
1994/95	967	139	138	816	152
1995/96	974	141	144	819	152

FRESH CITRUS: SUPPLY & UTILIZATION, SELECTED COUNTRIES

1993/94-1995/96 1/
(1,000 METRIC TONS)
TABLE 6: OTHER CITRUS

Country/Year 3/	Production	Imports	Exports	Consumption 2/	Processed
Total Northern Hemisphere					
1993/94	1,378	113	147	1,145	199
1994/95	1,402	139	155	1,180	206
1995/96	1,399	141	166	1,176	198
Southern Hemisphere					
Brazil 9/					
1993/94	693	0	1	643	49
1994/95	663	0	1	627	35
1995/96	NA	NA	NA	NA	NA
Total Southern Hemisphere					
1993/94	693	0	1	643	49
1994/95	663	0	1	627	35
1995/96	NA	NA	NA	NA	NA
Total World					
1993/94	2,071	113	148	1,788	248
1994/95	2,065	139	156	1,807	241
1995/96	NA	NA	NA	NA	NA

1/ Forecast

2/ In Greece, Italy, and Spain "consumption" includes fruit withdrawn from the market under the European Union price support program.

3/ Crop years refers to harvest and marketing period, which usually begins in the fall and extends to the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs almost entirely during the second year shown. The harvest of limes usually begins earlier and often extends throughout the year.

4/ Mostly limes but some sour oranges and other varieties.

5/ Mostly bergamots.

6/ Sour oranges.

7/ Summer oranges (Natsu mikan or natsu daidai, a hybrid of mandarin with sour orange or pomelo).

8/ Limes

9/ Limes, state of Sao Paulo only, which apparently accounts for roughly 80 percent of Brazil's lime production.

**U.S. EXPORTS OF FRESH GRAPEFRUIT
MARKETING YEARS 1990/91-1994/95 ^{1/}
Metric Tons**

Destination	1990/91	1991/92	1992/93	1993/94	1994/95
North America					
Canada	77,913	68,260	69,444	74,378	77,472
Mexico	25	31	0	120	1,639
Subtotal	77,938	68,291	69,444	74,498	79,111
The European Union (EU-15)					
France	53,477	53,096	51,050	39,454	43,428
The Netherlands	42,123	29,395	29,021	26,469	33,908
Belgium-Luxembourg	9,896	6,561	14,567	15,849	9,934
United Kingdom	12,378	10,885	10,484	9,585	12,484
Germany	2,991	7,014	10,833	8,861	15,250
Sweden	1,209	1,137	1,202	896	587
Other	1,589	1,367	1,117	1,000	1,451
Subtotal	123,663	109,455	118,274	102,114	116,455
Other Western Europe					
Switzerland	2,142	2,683	2,870	876	392
Other	14	36	44	71	104
Subtotal	2,156	2,719	2,914	947	496
East Asia					
Japan	241,796	253,666	222,775	250,229	246,310
Taiwan	11,780	16,850	18,025	18,567	21,629
Korea	4,293	4,918	4,931	7,589	15,219
Hong Kong	2,128	1,946	2,330	2,459	4,163
Other	364	637	1,078	653	1,034
Subtotal	260,361	278,017	249,139	279,497	288,355
Other Countries	756	699	1,232	1,653	1,467
Grand Total	464,874	459,181	441,003	458,709	485,884

^{1/} Marketing season begins September of first year shown.

Source: U.S. Bureau of the Census

JAPANESE IMPORTS OF HORTICULTURAL PRODUCTS FROM THE UNITED STATES AND THE WORLD, 1994

Japanese imports of U.S. horticultural products continue to expand. In 1994 Japanese horticultural imports from the United States reached a record \$2.2 billion, 30 percent above 1993 and 78 percent above the 1990 value. Fruit and vegetable categories with the most significant increases in 1994 were fresh vegetables (up \$107 million or 74 percent) and fresh citrus (up \$82 million or 18 percent). The U.S. share of the total Japanese horticultural import market increased to 29 percent in 1994, up from 27 percent in 1993. The high quality and consistent availability of U.S. product, continued yen revaluations, and aggressive market promotion fueled sales of U.S. products in Japan in 1994.

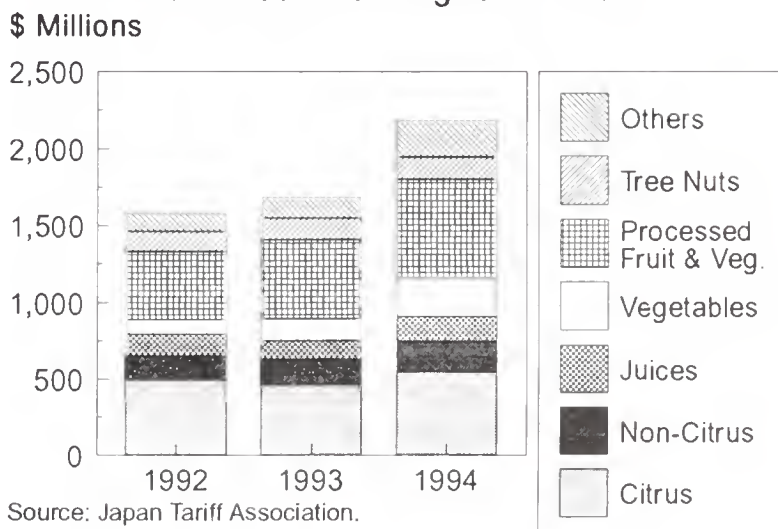
The Japan Tariff Association reported that total Japanese imports of horticultural products increased 9.5 percent to 767 billion yen in 1994. In dollar terms, this was an increase of 19 percent, to \$7.5 billion. Imports from the United States in 1994 were valued at \$2.2 billion, an increase of 30 percent in dollar terms, and 19 percent in yen terms over 1993. As a result, the U.S. share of the Japanese import market increased in 1994 to 29 percent (by value), up from 27 percent in 1993.

In quantity terms, total horticultural imports were up 11 percent, while imports from the United States increased 42 percent. Fresh vegetables accounted for a large portion of the increase.

Horticultural products registering significant increases included grapefruit (up 23 percent by value to \$244 million), oranges (up 24 percent to \$186 million), frozen french fries (up 15 percent to \$144 million), fresh cherries (up 16 percent to \$107 million), onions (more than tripled to \$67 million), potato chips (up nearly eight-fold to \$64 million), and frozen concentrated orange juice (up 93 percent to \$34 million).

Few U.S. products registered declines in 1994. Lemons dropped 3 percent by value to \$115 million; canned peaches dropped 30 percent to \$6.4 million; apple juice dropped 7 percent to \$36 million; and pumpkins dropped nearly 50 percent to \$3.9 million.

Japanese Imports of U.S. Horticultural Products Climbed Even Higher in 1994



Japan is a Net Importer

Japan is one of the world's wealthiest countries, with a population of 126 million, about half that of the United States. Only about 7 million people, or about 5 percent of Japan's population, live in rural areas. Similarly, local agricultural production makes up a very small proportion of Japan's GDP -- only 3 percent. Only 12 percent of Japan's total land area is used in agriculture.

While the United States has an overall trade deficit, it has a trade surplus in agriculture. The opposite is true in Japan. Its agricultural trade deficit has run over ¥30 trillion (\$30 billion) for several years.

Japanese production of fruits and vegetables totalled 4,473,040 metric tons of fruit and 12,781,600 tons of vegetables in 1993. In that year, fresh fruit imports totaled 1,521,000 tons, about 24 percent of supply. In comparison, fresh vegetable imports totaled 246,000 tons, only 2 percent of supply. Since that time, both fresh fruit and fresh vegetable imports have increased significantly, especially fresh vegetables. Japan's total fresh fruit imports increased about 14 percent between 1992 and 1994; on the other hand, vegetable imports nearly tripled in that time. Japan's horticultural industry, like that in the United States, receives far less governmental financial support than other agricultural sectors. USDA's Economic Research Service calculates that Japan's orange industry has a producer subsidy equivalent (PSE) of only 4.3 percent of value of production, compared to over 90 percent for rice, wheat, and barley. The orange industry in Japan, in fact, has the lowest PSE of all of Japan's top ten agricultural commodities.

The United States is Japan's principal supplier for many horticultural products. In 1994, the United States supplied over 90 percent of Japanese imports of grapefruit, lemons, and oranges; fresh cherries, strawberries, and papaya; almonds; dried prunes; broccoli, celery, and lettuce; catsup, tomato paste and puree; and potato chips.

Why U.S. Items Are So Popular

There are many reasons why U.S. goods do so well in Japan, including: 1) high quality and consistent availability; 2) good value because of continued yen revaluations; and 3) aggressive Market Promotion Program activities.

Trade Policy Concerns are Still a Problem

Despite the success of the recent opening of the market for U.S. apple exports, many technical barriers remain in the Japanese market. Prior to 1995, no U.S. apples were permitted entry into Japan because of Japanese phytosanitary regulations. Phytosanitary and food chemical issues are very sensitive in Japan, and success in these areas is gradual.

In the apple market opening, for example, only Red and Golden Delicious apples from Washington and Oregon are permitted, and then only upon passing an arduous and expensive inspection process. Many other fresh produce imports are prohibited for similar reasons, including peaches, potatoes, tomatoes, sweet corn, spinach, peppers, and eggplant.

The grounds for these prohibitions are Japanese plant health regulations. As a result of stringent plant health import regulations that keep out nearly all imports and the existence of a domestic industry, Japan is a net exporter of pears, potatoes, peaches, and persimmons.

However, the advanced degree of sophistication of U.S. phytosanitary procedures has helped U.S. exporters capture a large share of many fresh produce markets. One example is the apple market where U.S. exporters dominate because most other producers have not replicated U.S. procedures.

Another trade barrier is the distribution system for such products as wine, and the government's role in making it difficult for wholesalers and retailers to distribute imported wine. Because of these problems, it is much more difficult to market an imported wine vis-a-vis domestic wines.

Still Room for Growth

While the United States dominates the Japanese import market in many commodities, it faces strong competition from other countries in a multitude of other products.

Fresh fruit competitors

In 1994, total Japanese fresh citrus imports increased 15 percent over 1993 to 566,000 tons. On the other hand, all other fresh fruit imports increased only 4 percent to 1,174,000 tons.

The United States has over 90 percent of Japan's import market in all major fresh citrus categories (oranges, grapefruit, and lemons), as well as fresh cherries, papayas, and strawberries. While the United States is the leading supplier of grapes (5,093 tons), the major competitor is Chile (4,510 tons). Mexico has nearly two-thirds of the avocado import market (2,443 tons) while the United States has the remaining third (1,298 tons). While the United States dominates the melon import market with 79 percent market penetration (28,768 tons), Mexico has 18 percent (6,639 tons). In kiwifruit, New Zealand dominates, sending Japan 39,567 tons in 1994, compared to only 217 tons from the United States.

In two non-competitive product areas, bananas and pineapple, the Philippines dominates. Japan imported 684,589 tons of bananas (74 percent) and 112,573 tons of pineapples (99 percent) from the Philippines.

Fresh vegetable competitors

In 1994, total Japanese fresh vegetable imports increased 66 percent by weight to 634,000 tons. The largest increases were seen in onions (up 233 percent to 207,000 tons) and pumpkins (up 25 percent to 157,000 tons).

The United States dominates the Japanese import market for such vegetables as broccoli, celery, lettuce, and onions. For asparagus, however, U.S. market share drops to 32 percent (6,899 tons). Several other countries also ship asparagus there, including Mexico (4,157 tons),

Philippines (3,309 tons), and Australia (3,147 tons). With pumpkins, U.S. share is only 4 percent (5,788 tons), and New Zealand is the principal supplier (95,882 tons or 61 percent), followed by Mexico (31,038 tons or 20 percent), and Tonga (16,993 tons or 11 percent). China dominates the shiitake mushroom market with 99 percent of 24,320 tons imported in total, as well as garlic (98 percent of 10,342 tons imported in total); peas (95 percent of 10,830 tons imported in total); and leeks (93 percent of 8,456 tons imported in total).

Juices

Juice imports in 1994 also increased dramatically, up 51 percent by volume over 1993. Every category saw an increase in imports.

Only with grapefruit juice (84 percent of 15.5 million liters imported) does the United States dominate in the juice market. Grape juice is next highest, with 47 percent of 14.4 million liters imported. Other competitors in the grape juice import market include Spain (2.6 million liters) and Australia (1.8 million liters). The United States has a 29 percent share (18.8 million liters) of Japan's FCOJ imports (64.8 million liters). Brazil leads here with 68 percent (46 million liters). The United States is the leading apple juice supplier (14.7 million liters or 25 percent), followed by Austria (14.2 million liters or 24 percent) and New Zealand (5.8 million liters or 10 percent).

Processed products

In this area, U.S. interests dominate in many product lines. For catsup, tomato paste and puree, and canned sweet corn, U.S. share is 90 percent or greater; also dried prunes and potato chips (see table on pages 45 and 46).

Tree nuts

In contrast to the general increase in horticultural imports, Japanese tree nut imports declined in 1994. All categories showed declines except shelled walnuts and pistachios.

The United States has nearly all of the market share for almonds (over 99 percent) and walnuts

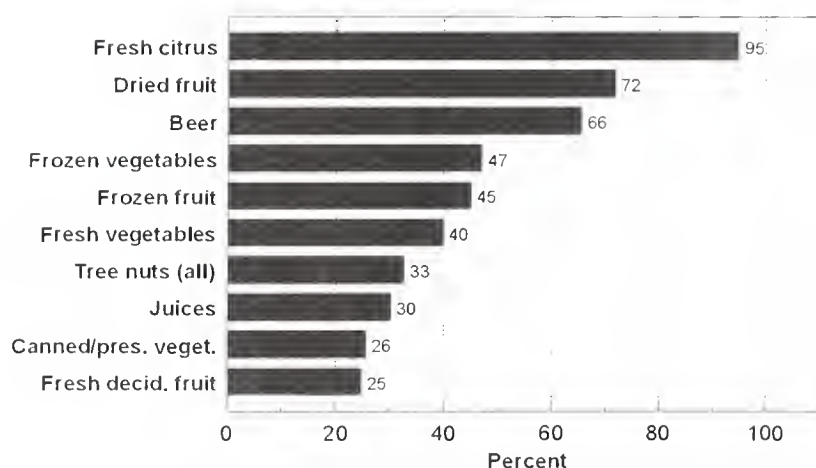
(70 percent for shelled; 86 percent for unshelled). China is the leading chestnut supplier (26,350 tons or 93 percent); the Philippines is the principal supplier of coconut (1,817 tons or 91 percent); India is the leading supplier of cashews (5,407 tons or 95 percent); and Iran is the leading pistachio supplier (6,466 tons or 84 percent).

Wine and Beer

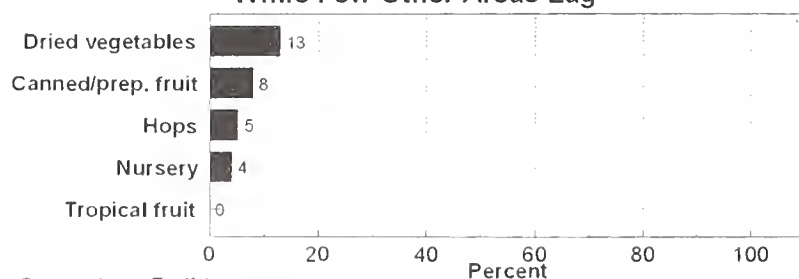
Total imports of wine and beer increased dramatically in 1994, up 176 percent for beer to 324 million liters, and up 24 percent for wine and related products to 126 million liters.

Only in beer does the United States dominate in this area. Japanese imports totalled 324 million liters, of which 213 million (66 percent) came from the United States. With wine (product breakouts are not available), France is the leading supplier with 31.2 million liters or 37 percent of total imports of 83.6 million liters. Germany was second with 15.8 million liters (19 percent); the United States was third with 7.8 million liters (9.4 percent); and Italy was fourth with 7.4 million liters (9 percent).

The United States Has a High Market Share of Japan's Horticultural Imports in Most Product Areas



While Few Other Areas Lag



Source: Japan Tariff Association.

Quality and Appearance Are Important

Japanese consumers prefer the highest quality fresh produce. Appearance is so important that bananas are often individually wrapped, according to the U.S. agricultural trade office in Tokyo. As a result, brightly colored California oranges sell for more than locally grown mikan tangerines.

Similarly, U.S. fresh cherries sell well in Japan, compared to local varieties, mainly because they are larger, cheaper, and sweeter. Grapefruit and lemons have no competition and thus do well.

U.S. broccoli, cauliflower, and other brassicas sell well in Japan, as they look as good as the local product, but are much cheaper. New items not native to Japan have great potential appeal.

Gift and Mail Order Markets are Booming

The gift market is significant and growing rapidly. For this important niche, exporters may want to develop gift packs and other types of packaging that cater to Japanese taste patterns. The premium gift market segment, where the image of high-quality U.S. goods is most appreciated, is very promising. Grapefruit, melons, and oranges are well-established fresh fruit gifts. Mail order should also be evaluated as an option in marketing gift items directly to Japanese consumers.

Imports by private individuals using mail-order catalogs have been stimulated by the rapid rise in the value of the yen since March 1995. The word has gotten around that foreign goods can be imported inexpensively. The Manufactured Imports Organization (MIPRO), an auxiliary organ of the Ministry of International Trade and Industry, estimates that the number of imports using catalogs will exceed 3 million orders in 1995.

MIPRO's individual import information center in Tokyo has over 1,500 foreign mail-order catalogs available for visitors' perusal. There is even a handbook for beginners. Several hundred people visit each day to inquire about how to make individual imports and to look over the catalogs. Individual importing boomed in the period

between 1986 and 1989, when the value of the yen soared from 260 yen on the dollar to around the 160-yen level and then subsequently up to the 120-yen-per-dollar mark. The exchange rate later settled at around 150 yen on the dollar, but when it reached the 100-yen-per-dollar level in 1994, private imports surged again. They have increased especially rapidly since March 1995 when the yen climbed to the 80-yen-per-dollar level.

Whereas men led the first boom, this time the leading shoppers have shifted to women, particularly young people. In 1987, 4.6 times as many men as women visited the information corner, but in 1994 their numbers were about equal. The ratio of young people under age 30 has also risen from 34% to 45%.

Most observers in the mail-order industry believe that the yen will be high for some time to come, and a succession of major mail-order houses have begun acting as agents for individual imports. Partly because of this, knowledge of individual importing is spreading rapidly, and in the future more people will probably start taking advantage of this system.

Japanese Marketing Channels

Japanese consumers have a high disposable income and typically spend a higher percentage of income on food than in the United States. Quality and freshness are paramount concerns. Packaging is given more attention than in the United States, and most food purchases are made by women.

There are five types of retail outlets for food in Japan (in order of importance): 1) "grocery stores," described as small non-self-service stores; 2) specialty food stores, like meat seafood, or tofu shops; 3) supermarkets; 4) convenience stores; and 5) department stores.

The various types of retailers have different approaches in their marketing efforts. Supermarkets use newspaper ads, in-store sampling, and special fairs. Grocery and specialty stores do little more than occasional discounts. Department stores have in-store sampling, special areas in the store for

promotions, gift corners, and special fairs. Convenience stores make no major promotions.

In coming years, U.S. horticultural exports will continue to increase. Fresh fruit and fruit juices, fresh vegetables, wine and hops will have higher sales, provided strict attention is paid to high quality and consistency in delivery.

The United States exports a wide variety of horticultural products to Japan. Many of these products have been selling well in the past few years, while others are relatively recent arrivals, like fresh apples and orange juice.

Apples

Following many years of efforts aimed at securing access to Japan's market for U.S. apples, Washington State apples entered the market in January 1995. Apple sales reached \$10.6 million last season, an amount slightly below industry expectations due to competition from domestic apples and consumer concerns with chemical residues. The Japanese market will remain limited because of a costly and stringent inspection process which requires a tree-by-tree pest inspection. The inspection process translates into a higher U.S. export price for apples destined for Japan. Additionally, Japanese officials have approved imports of only Washington State and Oregon Red and Golden Delicious apples, thus excluding other apple varieties and other states.

While apple sales to Japan were slightly below U.S. industry expectations the outlook for U.S. apples remains favorable. Within 5 years, apple exports to Japan could reach over \$75 million per year. Despite the recent opening, U.S. apple exports held a 99 percent share of the Japanese apple market, by volume, by the end of the 1994/95 season, with the other 1 percent held by the South Korea. New Zealand, the only other country with access to the Japan market, had not registered any exports last season.

Grapes

U.S. grape exports to Japan are seasonal (sales take place during late fall and winter) and fluctuate from year to year. However, Japan

remains a significant export market in terms of export value. Japanese buyers are willing to pay high prices to purchase the best quality fruit available.

In 1994, Japan imported the highest level of U.S. grapes since 1988. In addition, the value of exports topped \$10 million for the first time. Exports are expected to reach \$12 million in 1996.

Fresh Cherries

Japan is the most important export market for U.S. fresh cherries. In 1995, U.S. cherry shipments to Japan reached a record 17,000 tons valued at \$111 million. This achievement was accomplished even though production was down significantly because of weather-related problems. Japan pays top dollar for U.S. fresh cherries. In years like this one, when production is low, this market becomes critical to the profitability of U.S. cherry producers.

Cut Flowers

The growing fondness among the Japanese for cut flowers has pushed demand and resulted in a steady rise in imports. In 1994 the total value of imports came to 20 billion yen (\$195 million), 3.8 times more than a decade earlier.

Cut flowers were initially purchased from abroad to offer varieties not grown in Japan and supplement domestic stocks during off-seasons. Today, however, they play a vital role in ensuring selection, stable supplies, and lower prices year-round. According to industry statistics, imported cut flowers comprised 9.6% of the total domestic supply in 1994. Japan bought a substantial volume of orchids from Thailand and Singapore; lilies, freesias, and tulips from the Netherlands; chrysanthemums and gladiolas from Taiwan; calla lilies from New Zealand; and wax flowers from Australia. The United States supplies only around 3 percent of Japan's imports.

Southeast Asia and Oceania continue to be important suppliers to Japan, but the list of countries is growing fast, thanks to the rise in the value of the yen and improvements in

transportation. Today Japan purchases cut flowers from 40 countries, compared to just 5 countries 20 years ago. Transporting goods from one side of the globe to another is now a simple procedure; shipments of roses from Kenya reach Japan in just 20 hours.

Imports appear on the market in greatest quantity from October to December, when domestic flowers are in short supply. During these months some 20 percent of florists' offerings come from abroad. Imports of spray chrysanthemums from Taiwan and other countries are particularly high in March, August, and September, when Japanese families offer flowers at family graves and in other Buddhist memorial services. The shortage of chrysanthemums following the extended heat wave in the summer of 1994 led suppliers to buy up spray chrysanthemums from the Netherlands and elsewhere to tide over the crisis. On Mother's Day, the holiday on the second Sunday in May when children customarily give their mothers carnations, florists overflow with varieties from Spain and Colombia. Cut flowers for personal use comprise about 30 percent of the total. About half are used as offerings at the graves of family members or Buddhist altars in the home. However, vases of flowers have begun to grace a growing number of tables and homes, and it has become common for people to replace flowers regularly. Per capita consumption in Japan is still lower than that in the United States or Europe, but suppliers believe that the use of cut flowers in the home will spread and imports will continue to expand.

Canned Sweet Corn

The United States is by far the largest foreign supplier of canned sweet corn to Japan, with market share of approximately 90 percent. The versatility and ease of preparation of canned sweet corn ensure the product's continued popularity in Japan, in line with the country's booming demand for convenience food items. Canned sweet corn is especially popular with working women, young housewives, and students. At the same time many Japanese consumers are stressing healthier eating, so canned sweet corn with low salt levels is beginning to sell well.

Japanese supermarkets heavily promoted canned sweet corn during the 1993 marketing season. As a result, canned sweet corn is now widely distributed throughout the nation and has become a regular shelf item at many supermarkets and fast-growing convenience stores. Moreover, many Japanese supermarkets developed their own "private brands" through manufacturing and purchase agreements with foreign suppliers.

Japan's imports of canned sweet corn, though, may be reaching something of a plateau since they increased by only 5 percent in 1994. This follows dramatic annual increases of 25 percent and 28 percent in 1992 and 1993, respectively. Imports will increase in 1995 due to lower domestic production. However large stocks will moderate the increase.

Currently, there is only limited third-country competition for U.S. canned sweet corn in the Japanese market, but recent growth in imports from Australia and New Zealand suggest that this may change in the future. In general, a widening range of overseas suppliers are targeting the burgeoning Japanese market for imported vegetables.

Fresh Citrus

Japan is the largest foreign market for U.S. citrus, accounting for nearly half of the total value of U.S. fresh citrus exports. Grapefruit accounts for the largest single share of imported citrus, followed by oranges and lemons. Other citrus imported by Japan includes mandarins, tangerines, tangelos, and limes.

While the fresh grapefruit market may have reached a mature stage around the 280,000 metric ton level, slower-but-significant expansion is still expected, particularly for red varieties. Fresh grapefruit is now widely marketed throughout Japan, from the northern tip of Hokkaido to the southern-most islands of Okinawa.

Red grapefruit is marketed mainly from December through February when taste of the fruit reaches its prime. It is particularly popular in the Kyushu and Shikoku regions of Japan.

White grapefruit (80 percent market share) still plays the major role in Japan's grapefruit market and is most heavily marketed from March through May throughout the country, but particularly in the Tokyo area.

The U.S. industry continues to do an excellent job promoting navel oranges in the Japanese market. The peak marketing season for U.S. navel oranges is in March through May, while U.S. Valencia oranges first appear in Japan around May. At the same time, domestic fresh fruit are scarce during this period; in particular, Japanese fresh mikans are normally sold until February.

Orange Juice

U.S. exports of frozen concentrate orange juice (FCOJ) to Japan dropped off in marketing year 1994/95 due to strong competition from lower priced Brazilian juice. Brazilian orange juice storage terminal, operating successfully in Japan since May 1993, has helped boost imports from Brazil. Imports of single strength orange juice, although still small compared to FCOJ, are expanding significantly. Industry sources are optimistic about continued growth in this trade, as consumers are showing a growing preference for "original" taste of fresh orange juice. This is good news for U.S. exporters who are the major suppliers of the single-strength market. The record strong yen has encouraged Japanese juice traders to import more single strength juice from the United States.

Frozen french Fries

Japan is the most important export market for U.S. frozen french fries. U.S. shipments to Japan in 1994/95 (July-June) were valued at a record \$115 million, 21 percent above the previous year and 60 percent above the value of 5 years ago.

Japan's domestic production of frozen potatoes is small so imports dominate this steadily growing market. The food service sector sets the tone for Japan's expanding frozen french fry imports. Japan's fast food hamburger and fried chicken restaurant chains have been growing steadily in the last decade. McDonald's

restaurants, for example, market over 50,000 metric tons of french fries annually, while Kentucky Fried Chicken outlets use over 20,000 tons. Japan's prolonged recession has resulted in some consumers shifting to lower-priced menus in many fast food establishments, which serve french fries. Some Japanese fast food outlets also use french fries as promotional items.

Fresh Vegetables

Fresh vegetable imports are enjoying an unprecedented boom. Imports from the United States accounted for the largest single share of the market at 28 percent, and were valued at \$251.9 million. The healthfulness of foods, and particularly fresh foods, is becoming more important in Japan, just as it is in the United States. Broccoli and fresh asparagus are the fastest growing vegetable imports. Although onion imports rose four-fold in 1994, much of the increase was due to an unusually poor domestic harvest in Japan. For more detail on the importance the Japanese market, see the special feature on U.S. vegetable exports on page 9.

Raisins

Japan is the second largest export market for U.S. raisins. U.S. shipments have risen steadily over the last five years, reaching \$35.6 million in the 1994/95 season, up about 14 percent from five years ago. The United States is by far the largest supplier of raisins to the Japanese market, despite being priced significantly higher than South African or Australian product. Raisins are particularly popular as an ingredient in baked goods and the U.S. industry works closely with the industry to develop new products that use raisins. Another popular outlet for raisins are restaurants, hotels, and institutions. The industry has been successful in getting raisins placed in dishes and meals in fast food and family restaurants, especially in salads, desserts, and dry curries.

Prunes

Japan is the top export market for U.S. prunes. In the 1994/95 season, U.S. exports to Japan hit \$30.2 million. While this is down slightly from

the 1993/94 season, it represents an increase of 70 percent from just five years ago. Most U.S. prunes reach the retail level through Japanese "rebaggers" which have good access to the complex Japanese retail system. About 40 percent of all U.S. prunes are natural condition prunes used to make prune extract destined for the manufacturing and baking industry. More so than any other market in the world, the U.S. prune industry has been successful in positioning prunes as a healthy, high quality snack. Industry promotion efforts emphasize the positive health aspects of eating prunes and focus on prunes potassium content as means to reduce high blood pressure.

(Joe Somers, 202-720-2974)

**Japanese Imports of Horticultural Products from the United States
and the World, 1993 and 1994**
(Quantities in Units as Shown, Value in \$1,000)

Group and commodity	1993		1993		1993		1994		1994		Percent U.S. Market Share, 1994
	Quantity U.S.	Value U.S.	Quantity World	Value World	Quantity U.S.	Value U.S.	Quantity World	Value World			
Fresh citrus fruit	MT										
Grapefruit	224,388	\$199,831	237,489	\$213,391	262,735	\$244,930	284,965	\$268,696		92.2%	
Lemons	87,002	\$117,767	89,276	\$125,189	85,020	\$114,680	90,322	\$126,273		94.1%	
Oranges, incl. mandarins	157,030	\$146,726	167,010	\$158,332	189,705	\$186,091	190,439	\$194,836		99.6%	
Other citrus	4	\$12	5	\$18	0	\$0	3	\$16		0.0%	
Subtotal	468,424	\$463,335	493,780	\$496,929	537,460	\$545,701	565,730	\$589,821		95.0%	
Fresh non-citrus fruit	MT										
Apples	0	\$0	37	\$52	0	\$0	242	\$772		0.0%	
Avocados	3,185	\$4,828	4,573	\$7,513	1,298	\$4,681	3,741	\$9,514		34.7%	
Bananas	0	\$0	913,612	\$476,387	1	\$3	929,799	\$433,428		0.0%	
Cherries	12,633	\$91,572	12,667	\$92,132	15,633	\$106,580	15,666	\$107,214		99.8%	
Grapes	3,296	\$8,010	7,776	\$18,919	5,093	\$14,189	9,648	\$25,766		52.8%	
Melons	16,709	\$14,004	2,242	\$24,435	28,768	\$24,613	36,622	\$38,582		78.6%	
Papaya	4,767	\$17,037	4,774	\$17,065	5,150	\$17,981	5,161	\$18,049		99.8%	
Peaches, nectarines	0	\$0	0	\$0	0	\$0	0	\$0		0.0%	
Pears	0	\$0	5	\$15	0	\$0	0	\$0		0.0%	
Strawberries	3,847	\$25,563	3,904	\$26,138	4,106	\$28,398	4,259	\$29,645		96.4%	
Other non-citrus	1,088	\$2,976	179,823	\$170,482	1,135	\$3,909	169,607	\$178,648		0.7%	
Subtotal	45,526	\$163,989	1,129,412	\$833,138	61,183	\$200,355	1,174,744	\$841,618		5.2%	
Canned/prepared fruit	MT										
Canned/prep. cherries	1,334	\$2,995	5,412	\$11,855	1,375	\$3,051	5,330	\$10,825		25.8%	
Canned peaches	7,017	\$9,205	60,854	\$62,995	5,043	\$6,427	78,770	\$75,835		6.4%	
Canned pineapple	1,606	\$2,124	69,925	\$61,832	1,733	\$2,269	83,998	\$66,547		2.1%	
Jams and jellies	1,812	\$4,391	9,741	\$29,650	1,497	\$3,342	11,952	\$36,716		12.5%	
Other canned/prep. fruit	16,011	\$22,816	164,518	\$332,774	23,227	\$30,514	227,510	\$432,985		10.2%	
Subtotal	27,781	\$41,531	310,451	\$499,106	32,874	\$45,603	407,560	\$622,908		8.1%	
Dried fruit	MT										
Dried prunes	15,429	\$32,944	15,577	\$33,159	14,003	\$36,994	14,113	\$37,196		99.2%	
Raisins	25,506	\$40,583	29,122	\$45,210	24,935	\$39,429	28,473	\$44,187		87.6%	
Other dried fruit	1,620	\$6,999	11,262	\$22,267	1,984	\$8,614	14,218	\$27,402		14.0%	
Subtotal	42,555	\$80,527	55,961	\$100,636	40,922	\$85,038	56,804	\$108,785		72.0%	
Frozen fruit	MT										
Frozen strawberries	12,545	\$21,178	22,915	\$35,890	16,644	\$29,434	28,240	\$46,208		58.9%	
Other frozen fruit	2,880	\$6,366	13,027	\$35,177	3,789	\$9,086	16,948	\$40,839		22.4%	
Subtotal	15,425	\$27,543	35,943	\$71,067	20,432	\$38,520	45,188	\$87,046		45.2%	
	1993	1993	1993	1993	1994	1994	1994	1994	Percent		

Group and commodity	Quantity U.S.	Value U.S.	Quantity World	Value World	Quantity U.S.	Value U.S.	Quantity World	Value World	U.S. Market Share, 1994
Fruit & vegetable juices									
	KL								
Grapefruit juice	11,686	\$26,437	13,417	\$30,653	12,939	\$30,413	15,468	\$35,941	83.6%
Orange juice (not conc.)	2,385	\$2,635	12,840	\$14,413	3,529	\$4,839	41,887	\$67,206	8.4%
Frozen conc. orange juice	9,720	\$17,846	48,072	\$75,920	18,747	\$34,480	64,761	\$108,549	28.9%
Grape juice	6,424	\$21,723	12,115	\$33,900	6,768	\$20,858	14,396	\$34,999	47.0%
Apple juice	13,905	\$39,071	44,921	\$94,102	14,673	\$36,315	58,792	\$107,268	25.0%
Other juices	6,196	\$14,101	20,199	\$46,477	13,505	\$34,179	35,112	\$94,375	38.5%
Subtotal	50,316	\$121,812	151,563	\$295,465	70,161	\$161,082	230,417	\$448,338	30.4%
Fresh vegetables									
	MT								
Asparagus	5,620	\$26,509	18,315	\$89,475	6,899	\$34,281	21,270	\$112,205	32.4%
Broccoli *					69,922	\$126,957	72,172	\$131,546	96.9%
Celery	2,283	\$1,739	2,285	\$1,744	4,384	\$3,204	4,396	\$3,218	99.7%
Lettuce	5,325	\$8,448	5,340	\$8,540	6,136	\$9,108	6,199	\$9,281	99.0%
Onions and shallots	39,494	\$18,705	62,158	\$30,327	158,774	\$66,802	207,187	\$95,977	76.6%
Pumpkins	9,641	\$7,553	126,185	\$100,206	5,788	\$3,876	156,783	\$110,320	3.7%
Tomatoes	0	\$0	52	\$149	0	\$0	241	\$994	0.0%
Other fresh vegetables	41,621	\$81,871	167,566	\$389,468	1,942	\$7,673	165,773	\$429,397	1.2%
Subtotal	103,983	\$144,824	381,901	\$619,910	253,846	\$251,900	634,021	\$892,937	40.0%
Canned/pres. vegetables									
	MT								
Catsup and other sauces	7,325	\$7,570	8,739	\$9,048	10,778	\$10,365	11,770	\$11,587	91.6%
Canned mushrooms	0	\$0	16,794	\$34,169	0	\$0	21,166	\$44,331	0.0%
Canned sweet corn	54,939	\$61,092	58,537	\$65,742	55,323	\$63,212	61,694	\$72,539	89.7%
Tomato paste and puree	9,109	\$8,409	79,865	\$77,618	85,377	\$10,723	89,604	\$91,425	95.3%
Sauces and soups	10,675	\$22,007	22,539	\$54,677	14,458	\$31,652	33,783	\$82,060	42.8%
Other canned/pres. veget.	5,921	\$7,133	979,422	\$469,286	7,859	\$9,485	454,410	\$474,903	1.7%
Subtotal	87,969	\$106,211	1,165,896	\$710,540	173,796	\$125,437	672,427	\$776,845	25.8%
Frozen vegetables									
	MT								
Frozen potatoes, french fry	126,791	\$125,920	145,476	\$146,809	142,279	\$144,756	162,135	\$167,907	87.8%
Frozen sweet corn	35,873	\$40,788	42,330	\$48,354	35,851	\$45,828	43,798	\$56,281	81.9%
Other frozen potatoes	8,879	\$10,776	9,957	\$12,169	9,846	\$12,154	13,466	\$16,179	73.1%
Other frozen vegetables	30,235	\$34,738	202,386	\$297,554	28,454	\$35,193	239,556	\$359,019	11.9%
Subtotal	201,777	\$212,221	400,149	\$504,887	216,431	\$237,932	458,955	\$599,386	47.2%
Dried vegetables									
	MT								
Dried onions	3,285	\$9,874	4,773	\$12,453	3,450	\$10,643	4,409	\$12,136	78.3%
Dried potato products	23,338	\$26,325	69,247	\$55,147	26,877	\$29,823	72,514	\$50,193	37.1%
Potato chips	1,378	\$8,520	1,378	\$8,520	10,815	\$63,891	10,887	\$64,062	99.3%
Other dried vegetables	645	\$3,441	310,684	\$286,305	689	\$3,979	232,662	\$297,400	0.3%
Subtotal	28,646	\$48,160	386,082	\$362,425	41,831	\$108,336	320,472	\$423,791	13.1%

Tree nuts									
Almonds, shelled/prep.	MT								
Almonds, unshelled	21,640	\$96,318	21,686	\$96,547	18,543	\$99,561	18,612	\$99,973	99.6%
Pistachios	98	\$412	98	\$412	26	\$141	26	\$141	100.0%
Walnuts, shelled	1,217	\$6,061	6,677	\$30,384	1,136	\$4,661	7,687	\$31,108	14.8%
Walnuts, unshelled	4,600	\$26,198	6,469	\$32,685	4,821	\$26,491	6,881	\$33,465	70.1%
Other nuts	598	\$1,458	598	\$1,458	417	\$992	487	\$1,117	85.8%
Subtotal	1,623	\$13,838	52,919	\$190,168	2,128	\$17,395	48,727	\$178,103	4.4%
	29,776	\$144,284	88,447	\$351,654	27,072	\$149,242	82,419	\$343,907	32.8%
Nursery products									
Cut flowers		\$5,231		\$157,881		\$6,180		\$191,627	3.2%
Other nursery		\$7,849		\$144,388		\$9,597		\$186,881	5.1%
Subtotal		\$13,080		\$302,269		\$15,777		\$378,508	4.2%
Hops and products									
Hops extract	MT								
Hops pellets	0	\$9	30	\$1,054	6	\$250	47	\$2,124	13.8%
Hops cones	416	\$3,016	8,675	\$82,565	440	\$2,696	8,251	\$70,430	5.3%
Subtotal	3	\$21	3	\$21	3	\$22	15	\$126	21.1%
	419	\$3,046	8,709	\$83,641	450	\$2,968	8,312	\$72,680	5.4%
Wine and beverages									
Beer	KL								
Sparkling wine	86,958	\$98,383	116,711	\$134,247	212,623	\$195,402	323,848	\$295,655	65.7%
Grape wines	263	\$1,148	4,565	\$53,754	414	\$1,813	6,060	\$75,704	6.8%
Other wine products	7,136	\$16,336	60,483	\$213,201	7,832	\$18,556	83,647	\$289,047	9.4%
Vermouth	0	\$0	2,108	\$4,109	0	\$2	1,836	\$3,439	0.0%
Other fermented beverages	3	\$12	1,645	\$5,351	5	\$32	2,049	\$6,277	0.3%
Subtotal	2,307	\$6,686	33,027	\$659,662	2,880	\$8,952	32,513	\$647,192	8.9%
	96,668	\$122,566	218,539	\$1,070,323	223,755	\$224,757	449,953	\$1,317,313	49.7%
Grand total		\$1,693,128		\$6,301,989		\$2,192,648		\$7,503,883	29.2%
Yen (million)		188,276		700,781		224,111		766,972	29.2%

* Broccoli trade was reported as an individual line item starting in 1994. Prior to that, it was aggregated with other brassicas.

Sources: Japan Tariff Association and the International Monetary Fund. Exchange rates used: for 1993, \$1.00 = ¥111.2; for 1994, \$1.00 = ¥102.21.

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